# AgLearn Reference Guide - Administrator

**Version 1.0**

## TABLE OF CONTENTS

# INTRODUCTION

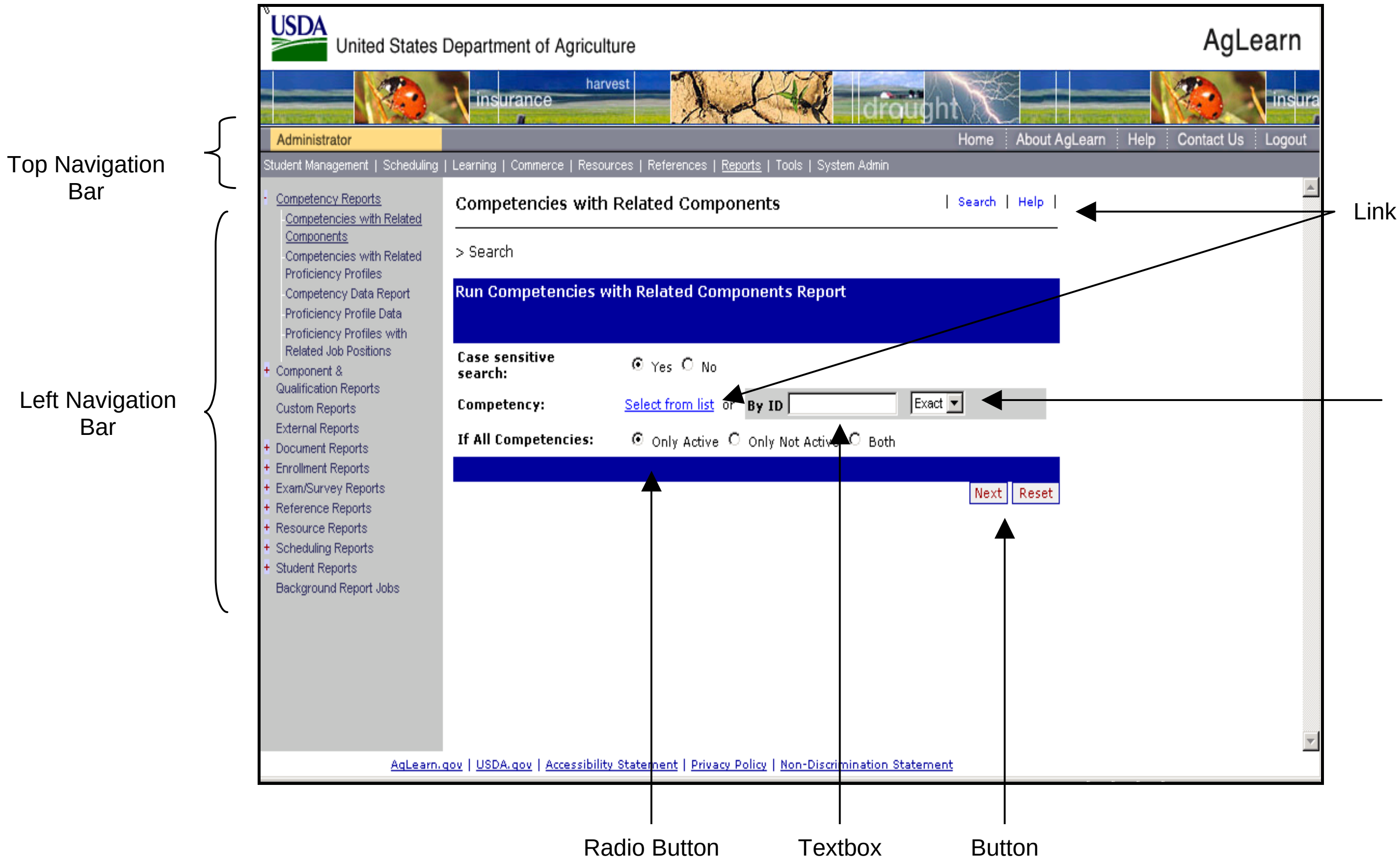
AgLearn is USDA's enterprise-wide learning management system (LMS), designed to manage all aspects of training within each agency as well as across the department. There are two main parts of the AgLearn system – an Administrator side and a Student side. The Student interface is where USDA employees and non-employees will go to search for available training, plan for their development, and record all completed training activity. All users of AgLearn will have access to this side of the application. What the student has access to, in terms of course offerings, will be determined by what part of USDA he/she belongs.

The Administrator view of AgLearn is reserved for only designated individuals who will be managing training for their Mission Area, Agency, or other predefined area of responsibility. This user guide will focus on the rights and abilities of the AgLearn system administrators.

AgLearn administrator functionality is structured according to the following main areas, which are accessible from the links on the top navigation bar in the system:

- **Student Management**: General student information is managed in this section. Any action on a student record occurs here (assigning student needs, recording learning).
- **Scheduling**: Scheduling and enrollment needs of the organization are managed in this section. Both instructor led courses and online learning can be scheduled.
- **Learning**: This section is where administrators can create learning activities. Here users can create a record for every learning activity or requirement that needs to be tracked in the AgLearn system.
- **Commerce**: In this section, general commerce related records are created for managing cost and tuition information. Catalogs are also created here.
- **Resources**: This section identifies all general training assets necessary for the delivery of classroom-based learning.
- **References**: In this section, users can enter unique values into tables that 'customize' the application specific to the organization. These tables provide the lists and drop-down menus to be used throughout the AgLearn system.
- **Reports**: A variety of reports can be generated and run from this section. All reports are exported into PDF format and can be printed.
- **Tools**: A collection of assistants (or wizards) can be found in this section. User passwords can also be changed.
- **System Admin**: This section is used to configure, control, and manage all domains, roles, and user accounts for all system administrators.

*Note: User access to these functions is determined by their role and corresponding rights within the system. Not all administrators will be able to see all sections, nor perform all tasks. Check with the agency eLearning point of contact for further information regarding the rights and roles of administrators within the agency or mission area.*




***AgLearn Admin View - Functionality***

- **Top Navigation Bar:** Each link represents a functional are a user can go to in the AgLearn system.
- **Left Navigation Bar:** Each link represents a function the user can perform within the AgLearn system.
- **Blue Search Icon:** This is the Search Page icon. When a user clicks the icon, a Search Page opens to search for an item. The item selected will populate information into the corresponding field to the right of the icon.
- **Required Fields (*):** Certain textboxes in the AgLearn system require information to be entered in order to process a function. These required textboxes are marked with a red asterisk. Information will not be saved if there are null values in any of the required textboxes.

For the purpose of this AgLearn Administrator Training Guide, each section represents one of the nine functions outlined across the top navigation bar. In each section a brief description of functionality, terminology, and user steps for general functions are provided.

# SECTION I: SYSTEM ADMINISTRATION

This menu provides top-level system administration functions for administrators. It is where an administrator can create new admin user accounts, create and assign sub-domains, and associate roles to admin users. In order for an admin to have access and navigate throughout the AgLearn system, it is critical that sub-domains and roles are assigned to each user account.

In this section of the application, administrators will perform the following functions:

- Domains
  - Creating a Sub-Domain
  - Adding a Domain Restriction to a Sub-Domain
  - Adding Sub-Domains to a Domain Restriction
- Role Management
  - Adding Roles
  - Setting Workflows for a Role
  - Applying Domain Restrictions to Workflows in a Role
- User Management
  - Creating an Administrator User Account
  - Assigning Roles to the Administrator User Account
  - Setting Administrator User Preferences
  - Accessing AgLearn with a new Administrator User Account

**Section Terminology**

| | |
|---|---|
| **Domains/ Sub Domains** | Indicates what data can be seen, and by whom. Domains act as an active filter for grouping data. |
| **Domain Types** | Types of tables that are controlled by the domain |
| **Domain Restriction** | Allows only users with permission to view or edit data within a domain |
| **Workflows** | Functions a user can do within the LMS, for example view student data, run reports, create catalogs |
| **Roles** | A group of workflows that define what a user can do within the AgLearn system |
| **Users** | A person who is assigned one or more roles within the system. Roles determine system permissions |
| **Development Plan** | A list of the learning activities a student must complete. Also includes completion dates and details for each learning activity |

## Domains

AgLearn creates data ownership through an entity called a Domain. Domains indicate what data can be seen, and by whom; and act as a filter for grouping data. Within the AgLearn system, domains only allow users with permission to view or manipulate rows of information within that pre-determined set of data.

Domains can be broken down in to more-specific areas of data called sub-domains. When domains are broken into smaller, more defined areas, hierarchies are formed between the root of the domain and its associated sub-domains. The agency's business processes and needs will determine how the structure of the agency's data will be broken down. By breaking down data into sub-domains, this makes it easier to search and manipulate information for users.

For example, the FFAS domain group includes the following sub-domains FAS, FSA, and RMA. When a user has access to data in the FFAS domain, he/she also has the ability to view down and manipulate data in the sub-domains FAS, FSA, and RMA. If a user only has rights to the sub-domain FSA, the user will not have the ability to view or manipulate data in FAS, RMA, and FFAS domains unless he/she is given permission to do so.

A user's permission to view or manipulate rows of information associated with a domain is called a Data Restriction. Administrators must create domain restrictions that limit the amount of data a user can view/manipulate within a domain. Domain Restrictions provide users limitations to access domains that are only in their "restriction" domain area.

The following step-by-step instructions provided are for creating a sub-domain:

- Create a sub-domain structure
- Add domain restrictions
- Add the domain restrictions to the created domain.

*Creating a Sub-Domain*

**Creating a Sub-Domain**

| Step | Action |
|---|---|
| **1.** | Click the **System Admin** link from the top navigation bar. |
| **2.** | Click the **Domains** link from the left navigation bar. The system will default to the Simple Search page. |
| **3.** | Click the **Add New** link in the upper right hand corner of the page. |
| **4.** | Enter the **Name of the Parent Domain** for the domain being created in the Select Parent Domain textbox.<br><br>OR<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Parent Domain<br>• Click the **Search** button<br>• Click the **Select** button to the appropriate Parent Domain |

| | |
|---|---|
| **5.** | Enter a **Domain ID** in the Domain ID textbox. Record the ID |
| **6.** | Enter a **Description** for the domain in the Description textbox. |
| **7.** | Click the **Inherit Parent level Domain Type** checkbox.<br><br>Note: By clicking this checkbox, the same domain types for the parent domain are assigned to the sub-domain. |
| **8.** | Click the **Add** button.<br><br>The user will be returned to the Domain Summary page with the new domain ID and description listed. |
| **9.** | (Optional) If changes need to be made to the created Domain ID and/or Description:<br><br>• Make the appropriate changes in the textboxes provided<br>• Click the **Apply Changes** button<br>• The user will be returned to the Domain Summary page. |

After the sub-domain is created, a domain restriction will need to be created then added to the sub-domain.

*Adding a Domain Restriction*

**Adding a Domain Restriction**

| Step | Action |
|---|---|
| **1.** | Click the **System Admin** link from the top navigation bar. |
| **2.** | Click the **Domain Restrictions** link from the left navigation bar. The system will default to the Simple Search page. |
| **3.** | Click the **Add New** link in the right hand corner of the page. |
| **4.** | Enter a **Domain Restriction ID** in the textbox. |
| **5.** | Enter a **Description** for the domain restriction in the textbox. |
| **6.** | Click the **Add** button.<br><br>The user will be returned to the Domain Restrictions Summary page with the new domain restriction ID and description listed. |
| **7.** | (Optional) If changes need to be made to the created Domain ID and/or Description:<br><br>• Make the appropriate changes in the textboxes provided<br>• Click the **Apply Changes** button<br>• The user will be returned to the Domain Summary page. |

Once a domain restriction is created in the system, the restriction can be re-used by various users. After the domain restriction is created, the user will need to assign one (or multiple) domains to the domain restriction.

*Adding Domains to the Domain Restriction*

**Adding Domains to the Domain Restriction**

| Step | Action |
|---|---|
| **1.** | Continue from the **Adding a Domain Restriction** steps above. |
| **2.** | From the Domain Restrictions Summary page, Select the **Domains** tab. |
| **3.** | Under the Add a Domain to the Domain Restriction section, Search for the Parent level Domain created in the above **Creating a Sub-Domain** steps:<br><br>• Click the **add one or more to the list** link<br>• Enter the **Domain ID** in the Domain ID textbox<br>• Click the **Search** button |
| **4.** | Click the **Top Level Only** and **Include Sub Domains** checkboxes.<br><br>Note: By clicking these checkboxes, the Parent Domain and its associated Sub Domains will be assigned to the Domain Restriction. |
| **e.** | Click the **Add** button.<br><br>The user will return to the Add a Domain to a Domain Restriction Summary page. |
| **6.** | (Optional) If changes need to be made to the added Domain(s) to the Domain Restriction:<br><br>• Click (uncheck) the appropriate **Include Sub Dmn**.  and/or **Remove** checkboxes<br>• Click the **Apply Changes** button.<br>• The user will be returned to the Add a Domain to a Domain Restriction Summary page. |

The following steps are now completed:

- Creating a sub-domain
- Creating a domain restriction
- Adding domains to the created domain restriction

The next step is to assign a user role to the created domains.  Please reference the Role Management section of this user guide.

**Role Management**

Admins are assigned roles dependent upon the USDA business needs and processes for that user. A user's assigned role grants him/her access to a set of functions called workflows that can be use to performed tasks in the AgLearn system. When creating a user's role, administrators may choose from over 600 predefined workflows. USDA has identified seven "vanilla" levels of roles with associated workflows that can be used when assigning a role to a new admin. Depending on the "level" (listed below 1-7) assigned to the user, will determine his/her functionality within the system.

The seven pre-defined roles to select for a new administrator are as follows:

**AgLearn Administrator**
This is the most robust Administrator Role in the system. The AgLearn Administrator has access to all Workflows in all Domains. Administrators will not be able to assign this level to a new admin user.

**Level 1: Training Lead**
The Level 1 Training Lead has access to every workflow within AgLearn, with the exception of those that affect global settings or global reference tables.

Level 1 Training Lead rights include:

- Manage Components, Content Objects, and Qualifications
- Manage Scheduling and Resources
- Manage Students
- Manage Catalogs and Commerce functions
- Manage most System Administration functions and Tools
- Run Reports

**Level 2: Manage Student Learning Needs**
The Level 2 Role is primarily responsible for managing and tracking students training needs. Some level 2 administrators may also have access to create components and schedule instances.

Level 2 rights include:

- Manage Components, Content Objects, and Qualifications
- Manage Scheduling and Resources
- Manage Students
- Manage Catalogs and Commerce functions
- Run Reports

**Level 3: Manage Learning Program**
The Level 3 Role is primarily responsible for creating courseware, components, and if needed, scheduled instances.

Level 3 rights include:

- Manage Components, Content Objects, and Qualifications
- Manage Scheduling and Resources

- Run Reports

**Level 4: Manage Facilities**
The Level 4 Role is primarily responsible for managing resources.

Level 4 rights include:
- Manage Resources
- Run Limited Reports

**Level 5: Manage Commerce**
The Level 5 Role is primarily responsible for managing financial aspects of training, such as training costs.

Level 5 rights include:
- Manage Commerce
- Run Limited Reports

**Level 6: IT Administrator**
The Level 6 Role is primarily for end-user troubleshooting.

Level 6 rights include:
- Limited System Administration capabilities
- Limited Student Management capabilities

**Level 7: View Only (Reports)**
The Level 7 Role is primarily a "view only" only, although this Role may also run most reports.

Level 7 rights include:
- Run Reports

*Creating a Role*

The following steps are required when creating a role for an admin user.
- Copy and modify a pre-existing role in the system
    - Note: A user may choose to use a pre-existing role in the system or create a new role. It is recommended to use a pre-existing role.
- Set the workflow for the role
- Apply domain restriction(s) to workflows in the role

**Adding a Role**

| Step | Action |
|---|---|
| **1.** | Click the **System Admin** link from the top navigation bar. |
| **2.** | Click the **Role Management** link from the left navigation bar. |
| **3.** | The system will default to the Simple Search page. |

| | |
|---|---|
| **4.** | • Enter a **Role ID** in the Role ID textbox the user wants to search<br>• Click the **Search** button |
| **5.** | Select the role to copy for the new admin user. Click the **Copy** button next to the appropriate Role ID.<br><br>Note: The user will copy a pre-existing role to create a new role. |
| **6.** | Enter in a new **Role ID** and **Role Description** in the textboxes. |
| **7.** | Click the following checkboxes:<br>• **Copy Assigned Workflows**<br>• **Copy Function Domain Restrictions**<br>• **Copy Entity Domain Restrictions**<br>• **Copy Workflow Domain Restrictions**<br><br>Note: When clicking the following checkboxes, the user is copying the assigned workflows and domain restrictions associated with the original role to the new role. |
| **8.** | Click the **Copy** button. |
| **9.** | Verify that the role has been added to the list of Roles on the Role Management page. |

Once a role is created, the administrator will need to set the workflows for that role.

*Setting the Workflow for a Role*

A Role is made up of workflows (functions / entities) used to grant the user access to specific system functionality. Workflows are set-up by administrators and cannot be changed by the users. If a user needs additional permission to functions in the system, he/she will need to contact their agency's administrator or eLearning point of contact.

**Setting the Workflow for a Role**

| Step | Action |
|---|---|
| **1.** | From the Role Summary Page,<br>• Click the **Role ID** just created<br>• Click the **Edit** link |
| **2.** | Select the **Workflows** tab from the Role Management page. |
| **3.** | Under the Add a Workflow to the Role, Click the **add one or more from list** link. |
| **4.** | Click the **+** icon to expand a workflow ID section. An expanded list of workflows will be displayed. |
| **5.** | Click the checkbox(s) next to each workflow(s) to add to the role. |

| | |
|---|---|
| **6.** | Click the **Apply Changes** button. |
| **7.** | Click the **OK** button when the Microsoft pop-up window displays it<br><br>“This action may take more than a few moments. Please wait for the page to refresh.” |
| **8.** | The user will be returned to the **Workflows** tab of the Role Management page.<br><br>If changes need to be made to the added Workflow:<br>• Click the appropriate **Remove** checkboxes to remove the Workflows<br>• Click the **Apply Changes** button. |
| **9.** | If additional Workflows need to be added, Click the **add one or more from list** link. |
| **10.** | Repeat steps 3-8 until all desired workflows have been added to the Role. |
| **11.** | Click the **Workflow Restr.** tab.<br><br>Verify that all desired workflows have been added to the Role. |

The workflow(s) for the new role has been created. To restrict user’s access to what data can be viewed and manipulated; a domain restriction will need to be added to the workflow.

*Applying Domain Restrictions to Workflows*

Domain Restrictions are used by administrators to set limitations on workflows. This limits the user access to domains that are only predefined in the set of restrictions applied.

**Applying Domain Restriction(s) to Workflows in a Role**

| Step | Action |
|---|---|
| **1.** | Click the **Entity Restr.** tab from the Role Management Screen. |
| **2.** | Click a **Domain Restriction ID** for each entity that has a textbox<br><br>OR<br><br>Search for the Domain Restriction ID:<br>• Click the Blue Search Icon to search for the **Domain Restriction ID**<br>• Select the Domain Restriction ID<br>• Click the **Search** button<br>• Click the **Select** icon<br><br>Note: If the Domain Restriction will be the same for each entity, |

| | |
|---|---|
| | • Click the **Apply to all Entities** radio button next to the corresponding Domain Restriction. |
| **3.** | Select a **State Restriction** from the drop-down menu for each entity, where applicable.<br><br>Note: The user can choose from Active, Inactive, or Both |
| **4.** | Click the **Apply Changes** button.<br><br>The user will be returned to the Edit Role Management Page under the Entity Restriction tab**.** |
| **5.** | Click the **Function Restr.** tab. |
| **6.** | Click the + icon to expand a workflow section. |
| **7.** | Verify that the selected Domain Restriction(s) has been associated to each function.<br><br>If changes need to be made:<br>• Select the **Entity Restriction** tab<br>• Repeat Steps 2-6. |

**User Management**

New admin user accounts are created in the User Management section of AgLearn. The user name created will be used by the user to log in to the AgLearn system as an administrator. When a new user account is created, the users will need to be assigned a role in the system.

In this section, the following functions will be explained:

- Creating an Admin User Account and Preferences
- Assigning Roles to the Administrator User Account
- Accessing AgLearn with an Administrator User Account

*Creating an Administrator User Account and Preferences*

When an administrator creates a new admin user account, the following USDA naming conventions must be followed:

- An admin's **User ID** will be the same as the user's **Student ID plus an 'A'** added to the end of the ID. For Example, if a student's ID is HSXM28 the admin user ID for this person would be HSXM28A.
- Please reference the user's Student's ID before creating the new admin user account.

When a password is created for the admin user account, the following USDA eAuthentication formatting criteria must be followed:

- Passwords must be **9 - 12** characters long.
- Passwords must contain the following:
  - At least **1** uppercase letter
  - At least **1** lowercase letter
  - At least **1** non-alphabetical character including numbers and the following special characters: ! # - $ % * = + : ; , ? ~
- Passwords CANNOT contain the user's name first or last or user ID.

**Adding an Administrator User Account**

| Step | Action |
|---|---|
| **1.** | Click the **System Admin** link on the top navigation bar. |
| **2.** | Click the **User Management** link on the left navigation bar. |
| **3.** | Click the **Add New** link in the upper right hand corner. |
| **4.** | Enter a **User ID** in the User ID textbox.<br><br>Note: This is Case Sensitive. The User ID will be used by the user to log into the AgLearn system as an administrator. |

| | |
|---|---|
| **5.** | Enter the **Last Name, First Name**, and **Middle Initial** in the appropriate textboxes. |
| **6.** | Enter the **Email Address** for the user in the textbox. |
| **7.** | Enter a **Password** in the New Password textbox.<br><br>Note: This is Case Sensitive. |
| **8.** | Retype the **Password** in the Verify Password textbox. |
| **9.** | Click the **Add** button.<br><br>The user will return to the Edit the User Summary page. |
| **10.** | (Optional) If changes need to be made to the added user:<br><br>• Make the appropriate changes in the textbox<br>• Click the **Apply Changes** button |

The user account for the new admin is now created. Next, the user will need to assign roles to the admin. If a role is not assigned to the user's account, the user will have limited system functionality when logged into the system.

When a user's role is assigned, it outlines the restrictions and privileges he/she has when logging in and navigating throughout the AgLearn system. Roles for specific system functions have already been define in the last section. Now an administrator can assign an existing role to a new user.

*Assigning Role to an Administrator User Account*

**Assigning Role(s) to the Administrator User Account**

| Step | Action |
|---|---|
| **1.** | Select the **Assigned Roles** tab from the User Management Page. |
| **2.** | Under the Add Roles to the User section, Click the **add one or more from list** link. |
| **3.** | Search for the desired Role(s),<br>• Enter in the **Role ID** and/or **description**<br>• Click the **Search** button |
| **4.** | Click the **Add** checkbox next to each Role to add to this administrator user account.<br><br>Note: A user can be assigned one or many roles. |
| **5.** | Click the **Add** button.<br><br>The user will return to the Edit the User Summary page. |
| **6.** | (Optional) Under the Update Assigned Roles for the User section, |

| | |
|---|---|
| | if changes need to be made to the added Roles,<br><br>• Click the appropriate **Remov**e checkboxes<br>• Click the **Apply Changes** button. |

Now, the user has a defined set of roles associated to his/her account. Next, the user's preferences will need to be determined. A user's preferences determined the language and time zone, which the system information will be displayed.

*Setting Administrator User Preferences*

The Regional Settings page allows a user to view and change his/her Active Locale **(**Language) and Time Zone settings. This screen also displays the Date, Time, Integer, Decimal, Currency, and Percentage patterns used in AgLearn. Each drop-down menu on the Regional Settings page will indicate the options users are available to choose.

**Setting Administrator Preferences**

| Step | Action |
|---|---|
| **1.** | Select the **Preferences** tab from the User Management Page. |
| **2.** | Enter the **Locale ID** in the textbox<br><br>OR<br>Search for the **Locale ID**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Locale ID<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Locale ID |
| **4.** | Enter the **Time Zone ID** in the textbox.<br>OR<br>Search for the **Time Zone ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Time Zone ID<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Time Zone ID |
| **5.** | Click the **Apply Changes** button. |

| | |
|---|---|
| | The user will be returned to the Edit Preferences Page. |
| **6.** | (Optional) If changes need to be made to the added Locale ID and/or Time Zone ID,<br><br>• Make the appropriate changes in the textboxes<br>• Click the **Apply Changes** button. |

Once the above steps are completed, the user may access the new admin user account by following the below steps.

*Accessing AgLearn with an Administrator User Account*

**Accessing AgLearn with the New Administrator User Account**

| Step | Action |
|---|---|
| **1.** | If currently logged into AgLearn, Click the **Logout** button. |
| **2.** | Enter the **User ID** and **Password** created for the new admin in the appropriate textboxes. |
| **3.** | Navigate throughout the AgLearn system.<br><br>Note: If a role was not assigned to the user's account, the admin will have limited functionality. |

In this section, the following functions within the System Administration menu of AgLearn we performed:

- Created Domains
- Assigned Roles to Users
- Created new Administrator User Accounts

# SECTION II: STUDENT MANAGEMENT

All aspects of a student's learning needs and training history can be managed under the Student Management menu. This includes managing basic student information, component assignments, and recording learning events. Administrators can also create new student records for students needing access to the AgLearn system. Some student will already be created in the system and not need a student records created for them. Student records were imported in to the AgLearn system from existing USDA databases.

In this section of the application, administrators can perform the following functions:

- Creating Student Records
    - Administrators Creating Student Records
    - Adding a Student Record to the Development Plan
- Assigning Learning Needs to a Student
    - Assigning a Free-Floating Component
    - Assigning a Qualification
    - Adding Components to the Development Plan
    - Assigning Components to Many Students
    - Reviewing Auto Assignments
- Managing Learning events
    - Recording Learning events for a non-scheduling Component
    - Recording Learning event for a Schedule Instance
    - Viewing Student Learning History

**Section Terminology**

| | |
|---|---|
| **Components** | A unit of learning identified and tracked in the LMS |
| **Free-Floating Components** | A component assigned to a student independent of a qualification |
| **Content Objects** | A record that points to an external file outside of AgLearn. I.e. a presentation of course content, a survey, a set of instructions that display on screen |
| **Learning Events** | Learning activities/components that a student has completed or attempted to successfully complete |
| **Learning History** | List of learning events recorded upon completion |

**Creating Student Records**

If a user needs to be created in the AgLearn system as a student, **please contact the eGovernment/eLearning team prior to creating the new user account.** Students will need to be assigned a Student ID formatted to the eAuthentication criteria.

Once a Student is created in the AgLearn system, a student record will need to be created. Student records are organized into functional chunks of information divided by tabs. These tabs provide the user with access to information regarding a student's training requirements and history. A student records contains the following tabs of information:

- **Summary tab:** On this tab, the user can view, add, or edit the selected student's name, Job Position, Job Location, Domain, Organization, Employment Type, Employee Status, contact information, hire/termination dates, and Supervisor information.

- **Phone Numbers tab**: On this tab, the user can view, add, edit, or remove the selected student's phone numbers.

- **Enrollment tab**: On this tab, it shows the enrollment of the selected student. The list provides the Component Title, Status, Start Date/Time, Location, and Instructor.

- **Custom Fields tab**: On this tab, the user can view, add, or edit the selected student's custom field data.

- **Requests tab:** On this tab, the user can view the selected student's requests for enrollment. The list shows the name of Component, its Title, Request Date, Required Date, and the Reason for the corresponding component.

- **Development Plan tab:** On this tab, the user can view, or edit the selected student's development plan.

- **Online Status tab:** On this tab, the user can control whether the selected student can access online courseware, and can view a historical record of the student's usage of online courses at the content object level of detail.

- **Learning History tab:** On this tab, the user can view the selected student's learning history, including detail information about all of the learning events, which have been recorded for this student.

- **Qualifications tab:** On this tab, the user can view, add, or edit the selected student's assigned qualifications.

- **Commerce tab:** On this tab, the user will see the selected student's shopping account, billing and shipping information. The user can edit and update the information.

When creating a student record, users are not required to enter data in every textbox on the page. The more information entered for the student, the more valuable AgLearn becomes to its users. Textboxes labeled with a red asterisk (*), do require information to be entered. A student record will not be saved if there are one or more null values in a required textbox.

*Administrators Creating Student Records*

**Administrators Creating Student Records**

| Step | Action |
|---|---|
| **1.** | Click the **Student Management** link from the top navigation bar. |
| **2.** | Click the **Students** link from the left navigation bar. |
| **3.** | Click the **Add New** link in the upper right hand corner of the page. |
| **4.** | Enter a **Student ID** in the textbox.<br><br>Note: If using the Auto Generate, leave the **Student ID** textbox blank and click the **Auto Generate** checkbox. |
| **5.** | Click the **Active** checkbox, if this student is currently active in the system. |
| **6.** | Enter the **Student's Name** in the appropriate textbox. |
| **7.** | Enter a **Job Position ID**<br><br>OR<br>• Click the Blue Search Icon<br>• Enter the **Job Position ID** and/or **Description** on the Search page<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate Job Position ID |
| **8.** | Enter a **Job Location ID**<br><br>OR<br>• Click the Blue Search Icon<br>• Enter the **Job Location ID** and/or **Description** on the Search page<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate Job Location ID |
| **9.** | Enter a **Domain ID**<br><br>OR<br>• Click the Blue Search Icon<br>• Enter the **Domain ID** and/or **Description** on the Search |

| | |
|---|---|
| | page<br>• Click the **Search** button.<br>• Click the **Select** button next to the appropriate Domain ID |
| **10.** | Enter an **Organization ID**<br><br>OR<br>• Click the Blue Search Icon<br>• Enter the **Organization ID** and/or **Description** on the Search page<br>• Click the **Search** button.<br>• Click the **Select** button next to the appropriate Organization ID |
| **11.** | Enter an **Employee Type ID**<br><br>OR<br>• Click the Blue Search Icon<br>• Enter the **Employee Type ID** and/or **Description** on the Search page<br>• Click the **Search** button.<br>• Click the **Select** button next to the appropriate Employee Type ID |
| **12.** | Enter an **Employee Status ID**<br><br>OR<br>• Click the Blue Search Icon<br>• Enter the **Status Type ID** and/or **Description** on the Search page<br>• Click the **Search** button.<br>• Click the **Select** button next to the appropriate Employee Status ID |
| **13.** | Enter the **User Contact Information** and **E-mail address** for the student in the appropriate textboxes. |
| **14.** | Enter a **Hired date** in this format (MM/DD/YY)<br><br>OR<br>• Click the Calendar Icon<br>• Select the correct **Hire Date**. |
| **15.** | Enter the **Student's Supervisor ID**<br><br>OR<br>• Click the Blue Search Icon<br>• Enter the **Student's Supervisor ID** and/or **Description** on the Search page<br>• Click the **Search** button. |

| | |
|---|---|
| | • Click the **Select** button next to the appropriate Student's Supervisor ID |
| **16.** | Click the **Add** button.<br><br>The user will return to the Edit Student Summary page. |
| **17.** | (Optional) If changes need to be made:<br><br>• Make the appropriate changes to the textboxes<br>• Click the **Apply Changes** button |

The new student record has been added to the system. Next, the student preferences for the student's language and time zone settings will need to be set.

The Active Locale ID and Time Zone ID controls display the times that are displayed to the student. It will adjust a time-based Component's Schedule Instance information according to the appropriate time zone and language for the student.

**Setting the User Preferences**

| Step | Action |
|---|---|
| **1.** | Select the **Preferences** tab from the Student Management main page. |
| **2.** | Enter the **Locale ID** in the textbox<br><br>OR<br><br>Search for the **Locale ID**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Locale ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Locale ID |
| **3.** | Enter the **Time Zone ID** in the textbox.<br>OR<br>Search for the **Time Zone ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Time Zone ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Time Zone ID |
| **4.** | Click the **Apply Changes** button. |

| | |
|---|---|
| | The user has the option to update the Locale Format Option. |
| **5.** | (Optional) If changes need to be made to the fields<br><br>• Make the appropriate changes from the drop-down menus.<br>• Click the **Apply Changes** button. |

A student record has been created and the student preferences set. Now, the user can begin assigning learning needs to the student. Learning needs can be fulfilled through assigning a specific learning unit, i.e. a course or exam, called a component to the user's development plan. A user may also assign learning needs through the Qualification tab. Please reference section: *Assigning Learning Needs to the Students*.

*Adding a Component to the Student Record from the Development Plan*

**Adding a Component to the Student Record from the Development Plan**

| Step | Action |
|---|---|
| **1.** | On the Student Summary page, Click the **Dev Plan** tab. |
| **2.** | Under the sub-section Assign Student Needs, Click the **add one or more from list** link to add a component. |
| **3.** | • Enter the criteria to search for the component that will be assigned to the student<br>• Click the **Search** button |
| **4.** | Click the checkbox(s) associated with the **Component(s)** to add to the Student's Development Plan. |
| **5.** | Click the **Add** button to submit this selection. |
| **6.** | Confirm that the component has been added to the student's development plan by reviewing the display at the bottom of the screen.<br><br>Note: Components may already be listed under the development plan based on information entered for the student on the student record page. |
| **7.** | If the added component is incorrect,<br><br>• Click the **Remove** checkbox to the appropriate component<br>• Click the **Apply Changes** button |
| **8.** | If chances need to be made to the Requirement Type, select the correct type from the drop-down menu. |
| **9.** | If changes need to be made to the **Required Date**,<br><br>• Enter the correct date |

| | |
|---|---|
| | OR<br>• Click the Calendar Icon and<br>• Select the correct **Required Date** |

The following has been performed in this section:

- Created a Student Record
- Set the Student Preferences
- Added a Component to the Development Plan

**Assigning Learning Needs to the Students**

The following section provides step-by-step instructions for adding learning requirements to a student through the Student Development Plan and Qualification tab. Adding a learning requirement, there are two types of requirements a user can assign to a student 1) a free-floating component and 2) a component associated with a qualification.

A Free-Floating Component allows the administrator to assign individual components without linking it to a qualification. An administrator would assign a Free-Floating Component if he/she wants to assign a class, requirement, etc. to a student that is not included on their development plan. For example, if a student is working on a new project using Microsoft Access, a user may assign a free-floating Component for a Microsoft Access course.

*Assigning a Free-Floating Component*

**Assigning a Free-Floating Component**

| Step | Action |
|---|---|
| **1.** | Click the **Student Management** link from the top navigation bar. |
| **2.** | Click the **Student** link from the left navigation bar. The system will default to the Simple Search page. |
| **3.** | • Search for the Student by **Student ID**<br>Or<br>• Enter in the **Student's name**<br><br>• Click the **Search** button.<br>• Select the Student in **Edit** Mode from the Search Results page to whom the component will be assigned. |
| **4.** | Select the **Dev Plan** tab. |
| **5.** | Under the Assign Student Needs section, Click the **add one or more from list** link to add a component. |
| **6.** | • Enter in the **Component ID**<br>OR |

| | |
|---|---|
| | • Enter in criteria to search for the component(s)<br>• Click the **Search** button |
| **7.** | • Click the **Add** checkbox(s) next to each component to add to the Student's Development Plan.<br>• Click the **Add** button. |
| **8.** | The user will return to the development plan from the Student page.<br><br>Under the Update the Development Plan section,<br>• Locate the component in the displayed list<br>• Select the **Requirement Type** from the drop-down menu |
| **9.** | Click the **Apply Changes** button. |
| **10.** | (Optional) If the added component is incorrect,<br>• Click the **Remove** box to the appropriate component<br>• Click the **Apply Changes** button |

*Assigning a Qualification*

A Qualification is a group of learning activities (components) and/or sub qualifications that are usually related to the same job, skill, or specialty. Students may have one or multiple qualifications assigned to them. Below are the different ways of assigning a qualification(s) to one or many students.

**Assigning Qualifications to One or Many Students**

| Step | Action |
|---|---|
| **1.** | Click the **Student Management** link from the top navigation bar. |
| **2.** | Click the **Student Needs Mgmt** link from left navigation bar. |
| **3.** | Under the Add Students section, Click the **add one or more from list** to locate a student(s). |
| **4.** | • Enter the Search criteria for the students<br>• Click **Search** button to view the students. |
| **5.** | Click in the **Add** checkbox for the students whom the qualification will be assigned. |
| **6.** | Click **Add** to return to the Assistant screen. |
| **7.** | To remove any of the "selected" students,<br><br>• Click the **Remove** Checkbox next to the appropriate student ID(s)<br>• Click the **Apply Changes** button |

| | |
|---|---|
| **8.** | If none of the selected students need to be removed, Click the **Next** button. |
| **9.** | Click the radio button for **Add Qualification**. |
| **10.** | Click the **Next** button. |
| **11.** | From the Add Qualification subsection, click the **add one or more from list** link to add a qualification. |
| **12.** | • Enter the Qualification Search Criteria<br>• Click **Search** to view a list |
| **13.** | Click the **Add** checkbox for the qualification(s) to add. |
| **14.** | Click the **Add** button. The qualification will be added to the Adding Qualifications Page.<br><br>To remove any of the "added" Qualifications,<br>• Click the **Remove** checkbox next to the appropriate qualification(s)<br>• Click the **Apply Changes** button. |
| **15.** | Click the **Next** button. |
| **16.** | Edit the **Assign Date** if necessary. To edit the Assigned Date,<br><br>• Enter the corrected **Assign Date**<br>OR<br>• Click the calendar icon<br>• Select the correct **Assign Date**.<br><br>Click the **Next** button. |
| **17.** | When the user has completed the above steps within the Assistant, click the **Run Job Now** button.<br><br>Note: To finish assigning qualifications to the selected students at a later time,<br>• Click the **Schedule Job** button<br>• Enter the **Time** and **Date** to run the job at a later time<br>• Click the **Finish** button |
| **18.** | The user will receive a status page indicating the job successfully ran. |

**Assigning Several Qualifications from the Student Information Page to One Student**

| Step | Action |
|---|---|
| **1.** | Click the **Student Management** link from the top navigation bar. |
| **2.** | Click the **Student** link from the left navigation bar. The system will |

| | |
|---|---|
| | default to the Simple Search page. |
| **3.** | • Enter the **Student ID** and/or **Student's Name** in the textboxes<br>• Click the **Search** button. |
| **4.** | Click the **Edit** link for the student in the results list to assign the qualification. |
| **5.** | Select the **Qualifications** tab for the student record to add an existing qualification. |
| **6.** | Under the Add A Qualification to the Student section, Click the **add one or more from list** link to add a qualification. |
| **7.** | • Enter in the **Qualification ID** and/or **title** in the textboxes<br>• Click the **Search** button |
| **8.** | Click the **Add** checkboxes next to the **Qualification(s)** to add. |
| **9.** | Click on **Add** button to save changes. |
| **10.** | To make changes to the qualifications assigned to Student(s),<br><br>Under the Update the Qualifications for the Student section:<br>• Make the appropriates changes in the textbox(s)<br>• Click the **Apply Changes** button |

*Adding Components to the Development Plan*

The development plan lists which components a user needs to take, including target or deadline completion dates for each. These can be free-floating, one time components or be retraining intervals for components already taken. ,

**Adding Components to a Development Plan**

| Step | Action |
|---|---|
| **1.** | Click the **Student Management** link from the top navigation bar. |
| **2.** | Click the **Student** link from the left navigation bar. The system will default to the Simple Search page. |
| **3.** | • Enter the **Student ID** and/or **Student's Name** in the textboxes<br>• Click the **Search** button. |
| **4.** | • Click the appropriate student to add a component to his/her development plan.<br>• Click the **Edit** button. The Student's Record Page will be displayed. |
| **6.** | Click the **Summary** tab. |

| | |
|---|---|
| **7.** | Select the job position for this student by entering in the **Job Position ID**<br><br>OR<br>• Click the Blue Search Icon<br>• Search for the appropriate Job Position ID<br>• Click the **Select** button |
| **8.** | Click the **Apply Changes** button. |
| **9.** | The user will be taken to the updated development plan with the added components for the associated job position ID entered on the Summary Page. |

*Assigning Components to Many Students*

Administrators can assign the same component to multiple students at a single time. This would occur when an administrator assigns components to students with similar job positions, job status, or have the same training needs.

**Assigning Components to Many Students**

| Step | Action |
|---|---|
| **1.** | Click the **Student Management** link from the top navigation bar. |
| **2.** | Click the **Student Needs Mgmt** link from left navigation bar. |
| **3.** | Under the Add Students section, click the **add one or more from list** to locate a student(s). |
| **4.** | • Enter the Search criteria for the students<br>• Click **Search** button to view the students. |
| **5.** | Click the **Add** checkbox for the students to assign the component. |
| **6.** | Click **Add** to return to the Assistant screen. |
| **7.** | To remove any of the “selected” students,<br><br>• Click the **Remove** checkbox next to the appropriate student<br>• Click the **Apply Changes** button |
| **8.** | If none of the selected students need to be removed, Click the **Next** button. |
| **9.** | Click the radio button for **Add Component**. |
| **10.** | Click the **Next** button. |
| **11.** | From the Add Component subsection, click on **add one or more from list** to add a component. |
| **12.** | • Enter in the Component Search Criteria |

| | |
|---|---|
| | • Click **Search** to view a list of components |
| **13.** | Click the **Add** checkbox for the component(s) to add. |
| **14.** | Click the **Add** button. The component will be added to the Adding Components Page.<br><br>To remove any of the "added" components,<br>• Click the **Remove** Checkbox next to the appropriate Component(s)<br>• Click the **Apply Changes** button. |
| **15.** | Click the **Next** button. |
| **16.** | Edit the **Assign date** if necessary.<br><br>• Enter in the corrected date<br>OR<br>• Click the Calendar icon<br>• Select the correct **Assign date**. (date cannot be in the future)<br><br>Click the **Next** button. |
| **17.** | Enter the **Requirement Type** in the textbox<br><br>OR<br>• Click the Blue Search Icon.<br>• Search for the appropriate Requirement Type<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate Requirement Type |
| **18.** | When the steps within the Assistant are completed, click the **Run Job Now** button.<br><br>Note: To finish assigning qualifications to the selected students at a later time,<br>• Click the **Schedule Job** button<br>• Enter the **Time** and **Date** to schedule the job for a later time<br>• Click the **Finish** button |
| **17.** | The user will receive a Status Page indicating the job successfully ran. |

Qualifications and components have now been added to the development plan for the selected student(s). Qualifications may also be automatically added to a development plan based on the information entered on a student's student record.

*Reviewing Auto Assignments*

Qualifications are associated with many different attributes of a student, for example a job position, job location, or job skill. When an administrator enters information about students in their student record, for example a job position ID, qualifications are automatically assigned to that student. AgLearn searches if any qualifications are associated with that specific job position ID. If qualifications are associated, students with that job position ID in their student record will be assigned the qualification(s).

To view auto assignments, follow the step-by-step instructions below.

**Reviewing Auto Assignments**

| Step | Action |
|---|---|
| **1.** | From the Student Management page, Select the **Qualifications** tab. |
| **2.** | Review the Qualifications that were added to the student record. |
| **3.** | Click the **Dev Plan** tab. |
| **4.** | The qualifications that were assigned to this student by the associated qualifications are listed on the Dev Plan. |

**Managing Learning Events**

When a component (learning activity) has been added to a user's development plan, he/she would enroll into a schedule instance, and then in some way complete the component. To complete the component; it may be a manual read, online content launched, or a seminar attended. Whatever the component type, the successful completion of the component needs to be recorded as 'complete' in the AgLearn system. The tool that assists a user when recording a completed learning event is called the Learning Event Recorder. The learning event recorder is a wizard that takes the user through each step for recording a scheduled and a non-scheduled learning event.

Some agency's will require the administrator to record the learning events for the students, other agencies may allow the students to record the learning even themselves. Please contact the agency's eLearning point of contact to determine the agency's policy.

*Recording a Learning Event for a Non-Scheduled Component*

A non-scheduled learning event is a learning activity that did not take place at a specific date or time. For example, a student that completed an online course that was self-paced.

**Recording a Learning Event for a Non-Scheduled Component**

| Step | Action |
|---|---|
| **1.** | Click the **Student Management** link from the top navigation bar. |
| **2.** | Click the **Learning Event Recorder** link from the left navigation bar. |
| **3.** | Click the **Component** radio button. |
| **4.** | Click the **Next** button. |
| **5.** | Enter the **Component Type** and **Component ID** to record for the student(s) in the textbox<br>OR<br>Search for the **Component ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Component ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Component ID |
| **6.** | Click the **Next** button. |
| 7. | Enter a **Default Grade** or **Default Completion Status** (whichever is required (*)) in the textbox. |
| **8.** | Click the **Next** button. |
| **9.** | Click the **add one or more from list** link to add students. |
| **10.** | Search for the student(s) for which to record the learning event. |
| **11.** | Click the **Add** checkbox next to each student that should be given credit for this component. |
| **12.** | Click the **Add** button.<br><br>(Optional) If changes need to made,<br>• Make the appropriate changes in the textboxes<br>• Click the **Apply Changes** button. The page will refresh. |
| **13.** | Click the **Next** button. |
| **14.** | Enter any comments for the student(s). |
| **15.** | Click the **Next** button. |
| **16** | • Enter financial information for the component, if applicable<br>• Click the **Next** button. |
| **17.** | Review the information and click the **Finish** button |

*Record a Learning Event – Schedule Instance*

A scheduled learning event, or a scheduled instance, is a learning event that took place at a specific date and time. For example, a scheduled learning event might be "the HR101 class scheduled for October 15 in Room 320 at the Main Office."

**Record a Learning Event – Schedule Instance**

| Step | Action |
|---|---|
| **1.** | Click the **Student Management** link from the top navigation bar. |
| **2.** | Click the **Learning Event Recorder link** from the left navigation bar. |
| **3.** | Click the **Schedule Instance** radio button. |
| **4.** | Click the **Next** button. |
| **5.** | Enter the Schedule ID<br><br>OR<br>Search for the **Schedule ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Schedule ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Schedule ID |
| **6.** | Click the **Next** button. |
| **7.** | Enter the **Default Grade** or **Default Completion Status** (whichever is required (*)). |
| **8.** | Click the **Next** button. |
| **9.** | Verify the students displayed attended the schedule instance.<br><br>**Not**e: A user may add additional students to this list by using **the add one or more from list** link or remove students from the list by checking Remove checkbox and clicking the "Apply Changes" button. |
| **10.** | Click the **Next** button. |
| **11.** | Enter any **comments**, **grades**, or **edit the status**, where applicable. |
| **12.** | Click the **Next** button. |
| **13.** | Edit **Price, Cost Centers, Profit Centers**, and **Order Ticket**, if applicable. |
| **14.** | Click the **Next** button. |
| **15.** | Click the **Finish** button. |

| | |
|---|---|
| **17.** | The user may now:<br>• **Start Over**<br>• **Print** the certificates for each student that successfully completed the course.<br>• **E-mail** the certificate to each student.  Certificates can be printed themselves. |

*View Student Learning History – Administrator*

The Learning History tab displays all successfully completed components (learning activities/events) that are recorded in the AgLearn system.  It also lists details such as the instructor and grade for each completed learning activity/event.

**View Student Learning History - Administrator**

| Step | Action |
|---|---|
| **1.** | Click the **Student Management** link from the top navigation bar. |
| **2.** | Click the **Student Management** link from the left navigation bar. |
| **3.** | Search for and access a student record in **View** mode that was recorded as a learning event. |
| **4.** | Select the **Learning History** tab. |
| **5.** | Review the student's Learning History data. |

# SECTION III: LEARNING

The Learning section allows a user to create components and qualifications. A user can also review and update existing component information including the component's related schedules, qualifications, associated contact and credit hours, prerequisites, required materials and equipment, objectives and online settings.

This menu provides the creation and managing of learning for students through the following functions:

- Components
  - Adding a Component
  - Creating a Time-Based Component
  - Creating an Online Setting Tab
  - Building an Online Structure
- Managing Online Contents
  - Creating an Online Object
- Qualifications
  - Creating Qualifications
  - Adding Components to a Qualification
  - Adding a Qualification to a Job Position
  - Assigning Qualifications to Students
    - (Reference Section II: Student Management)
  - Assigning a Qualification to Many Students
    - *(*Reference Section II: Student Management)
  - Revising Qualifications
- Viewing Component and Qualification records
- Catalogs
  - Adding Components to a Catalog

**Section Terminology**

| | |
|---|---|
| **Qualifications** | Groupings of components that can be assigned to students as a whole learning unit |
| **Components** | A learning unit, such as a course or exam, tracked by the organization in the LMS |
| **Free-Floating Component** | Component that is assigned to a student independently from the assignment of a Qualification |
| **Time Based Component** | A component that is restricted a specific date and time |
| **Catalog** | List of components accessible by the student |

**Components**

A component is a learning requirement that can be in the form of content, an exam, a survey, or external certification. A component can be classified as a Physical Good, Online Component, and/or Time based. Below is the description for each classification. Components can also be grouped by qualifications, some examples may include grouping by job position, job location, or employee type.

**Classification Descriptions**

| Field | Description |
|---|---|
| **Online Component** | This Component has online content and available via the Internet. Some Online Components are self-paced. |
| **Time-Based Component** | This Component can be scheduled, but may also contain online content for students to launch. These Components often contain both Schedule Instances to attend, and online content to complete. |
| **Physical Good** | Components that are ordered and shipped to the user. An order must be placed to "purchase" this component. |

When adding a component to the system, a domain will need to be associated and the user must determine the component's settings. The settings include whether a student can self- enroll for a component and if supervisors can record the completion of the learning activity for the student.

*Adding a Component*

**Adding Components**

| Step | Action |
|---|---|
| **1.** | Click the **Learning** link from the top navigation bar. |
| **2.** | Click the **Components** link from the left navigation bar. The system will default to the Simple Search page. |
| **3.** | Click the **Add New** button at the top of the content frame. |
| **4.** | Select a **Component Type** from the drop-down menu. |
| **5.** | Enter a **Component ID** in the Component ID textbox. |
| **6.** | Enter a **Revision Date** in the Revision Date textbox OR leave blank to default to the current date and time upon save.<br><br>OR<br>• Click the **Calendar** icon<br>• Select **the Revision Date** |

| | |
|---|---|
| **7.** | Enter a **Revision Time** and **Time Zone ID** in the textboxes. |
| **8.** | Select a Classification drop-down menu. |
| **9.** | Enter a **Title** of the Component to be displayed in the catalog in the textbox. |
| **10.** | Enter a **Source ID** in the textbox<br><br>OR<br>Search for the **Source ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Source ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Source ID |
| **11.** | Enter a **Subject Area ID** in the textbox<br><br>OR<br>Search for the **Subject Area ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Subject Area ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Subject Area ID<br><br>Note: (Optional) Selecting a Subject Area allows students to more easily find components when browsing through catalogs. |
| **12.** | Enter a **Domain ID** for the component in the textbox<br><br>OR<br><br>Search for the **Domain ID**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Domain ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Domain ID |
| **13.** | Enter a **Method ID** in the textbox<br><br>OR |

| | |
|---|---|
| | Search for the **Method ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Method ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Method ID |
| **14.** | Enter a **Req. Type ID** (Requirement Type ID) in the textbox. |
| **15.** | Click the **Active** checkbox to make the component active. |
| **16.** | Click the **Auto Fill Enrollment** checkbox.<br><br>**Note**: This sets the default for scheduled instances of this component so that students are automatically moved from the wait list to enrollment slots that open up when enrolled students unenroll. |
| **17.** | (Optional) Click the **Students can record Learning Events for themselves** checkbox. |
| **18.** | (Optional) Click the **Supervisors can record Learning Events for Subordinates** checkbox. |
| **19.** | Enter the **Create Date** for the component in the textbox<br><br>OR<br>• Click the Calendar Icon<br>• Select the **Create Date.** |
| **20.** | Enter a **Description** of the component in the textbox. |
| **21.** | Click the **Add** button. |
| **24.** | The system will return to the Component Summary Page. |

The steps adding a component to the system and restricting it to the specific domain are completed. Now, a time based component can be created and added to a student's learning needs. A Time Based Component restricts the training to a specific date and time i.e. a Instructor led course.

*Creating a Time Based Component*

**Creating a Time Based Component**

| Step | Action |
|---|---|
| **1.** | Click the **Learning** link from the top navigation bar. |
| **2.** | Click the **Components** link from the left navigation bar. The system will default to the Simple Search page. |
| **3.** | Click the **Add New** button at the top of the content frame. |

| | |
|---|---|
| **4.** | Select a **Component Type** from the drop down list. |
| **5.** | Enter a **Component ID** in the textbox. |
| **6.** | Enter a **Revision Date** in the textbox OR leave blank to default to the current date and time upon save.<br><br>OR<br>• Click the **Calendar** icon<br>• Select **the Revision Date** |
| **7.** | Enter a **Revision Time** and **Time Zone ID** in the textboxes. |
| **8.** | Select **Time Based** from the Classification drop-down menu. |
| **9.** | Enter a **Title** of the component to be displayed in the catalog in the textbox. |
| **10.** | Enter a **Source ID** in the textbox<br><br>OR<br>Search for the **Source ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Source ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Source ID |
| **11.** | Enter a **Subject Area ID** in the textbox<br><br>OR<br>Search for the **Subject Area ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Subject Area ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Subject Area ID<br>Note: (Optional) Selecting a Subject Area allows students to more easily find components when browsing through their catalogs. |
| **12.** | Enter a **Domain ID** for the component in the textbox<br><br>OR<br><br>Search for the **Domain ID**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Domain ID** |

| | |
|---|---|
| | • Click the **Search** button<br>• Click the **Select** button next to the selected Domain ID |
| **13.** | Enter a **Method ID** in the textbox<br><br>OR<br>Search for the **Method ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Method ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Method ID |
| **14.** | Enter a **Req. Type ID** (Requirement Type ID) in the textbox. |
| **15.** | Click the **Active** checkbox to make the component active. |
| **16.** | Click the **Auto Fill Enrollment** checkbox.<br><br>Note: This option is to set the default for scheduled instances of a component so students are automatically moved from the wait list to enrollment slots that open up when enrolled students unenroll. |
| **17.** | (Optional) Click the **Students can record Learning Events for themselves** checkbox. |
| **18.** | (Optional) Click the **Supervisors can record Learning Events for Subordinates** checkbox. |
| **19.** | Enter the **Create Date** for the component in the textbox<br><br>OR<br>• Click the Calendar Icon<br>• Select the **Create Date.** |
| **20.** | Enter the **Enrollment Threshold Days** in the textbox. |
| **21.** | Enter a **Description** of the component in the textbox. |
| **22.** | Enter **Comments, Instructor Materials** and/or<br>**Student Materials** as needed in the textboxes provided. |
| **23.** | Click the **Add** button. |
| **24.** | The system will return to the Component Summary Page. |

Next, an Online Component will be created.

*Creating a Component and adding an Online Setting*

Students can take these courses at their own pace and are accessible via the Internet. Depending on the component's settings, students may be permitted to self-enroll for online courses. A user when creating a component can also set the Online Completion Status to record the online component automatically as 'complete' in a student's learning history when successfully completed.

**Add a Component**

| Step | Action |
|---|---|
| **1.** | See table: **Adding Components** |

**Online Settings Tab**

| Step | Action |
|---|---|
| **1.** | Click the **Online Settings** tab from the Component Summary page. |
| **2.** | Click the **Component is online** checkbox. |
| **3.** | Click the **Mark component complete when all objects are complete** checkbox. |
| **4.** | Select the **Online Completion Status** from the drop-down menu. |
| **5.** | Select an **Online Failure Status** from the drop-down menu.<br><br>**Not**e: This is only needed if an online test/exam will be given. |
| **6.** | Click the **Apply Changes** button. |

The component created is now accessible via the Internet. Next, an object for the structure of the online component will be added. The Content Object stores the online component (see Section: Managing Online Components) and allows a user to create and maintain content object information.

*Building an Online Structure*

**Build the Online Structure**

| Step | Action |
|---|---|
| **1.** | Under the Edit the Online Settings & Status for Component section, Click the **Edit** link next to the Group Item (designated by a File Cabinet). |
| **2.** | Under the Add an Object to the Structure section, Enter an **Object Label** in the textbox.<br><br>This is the title of the online component displayed to the student. |
| **3.** | Click the **Conten**t radio button. |
| **4.** | Enter the **Content Object** in the textbox<br>OR |

| | |
|---|---|
| | Search for the **Content Object**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Content Object ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Content Object ID |
| **5.** | Click the **Mark this object COMPLETE when launched** checkbox. |
| **6.** | Click the **Add** button. |

**Managing Online Components**

Online Content is accessible to students through launching online components. These online components, using online content, are available from any source (location) and allow the same content to be used by many students without having the need to replicate data. The online components are stored in what is called a content object.

A content object is a record that contains instructions on where to find and how to launch an online component such as a course, exam, tutorial, or other online applications. Content objects are reusable and can be used in multiple components at the same time. Content objects are accessible via the Internet from the Content Object section of AgLearn and denoted by a file cabinet icon.

*Creating an Content Object*

**Add a Content Object**

| Step | Action |
|---|---|
| **1.** | Click the **Learning** link from the top navigation bar. |
| **2.** | Click the **Content Objects** link from the left navigation bar. The system defaults to the Simple Search page. |
| **3.** | Click the **Add New** link. |
| **4.** | Enter a **Content Object ID** in the textbox. |
| **5.** | Enter the **Title** for the Content Object in the textbox. |
| **6.** | Enter a **Domain ID** for the component in the textbox<br><br>OR<br>Search for the **Domain ID**:<br>• Click the Blue Search Icon |

| | |
|---|---|
| | • Enter the search criteria for the **Domain ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Domain ID |
| **7.** | Enter the **Build Location, Company, User** and **Date** in the appropriate textboxes. |
| **8.** | Enter the Build Date in the textbox<br><br>OR<br><br>• Click the **Calendar** Icon<br>• Select the appropriate Build Date |
| **9.** | (Optional) Click the **Object is Active** and **Online** checkboxes. |
| **10.** | Enter a **Description** for the Content Object in the textbox. |
| **11.** | Enter the **Developer Tool** used to build the content object in the textbox. |
| **12.** | Click the **Add** button. |
| **13.** | The user will return to the Content Object Summary page. |

A Content Object is now created. Next, select the Launch Method Tab of the Content Object to enter where the Content Object is located.

**Launch Method Tab**

| Step | Action |
|---|---|
| **1.** | Click the **Launch Method** tab from the Content Object page. |
| **2.** | Click the appropriate radio button for the Content Object. |
| **3.** | Enter the **URL address** where a student can access the online content in the Filename textbox. |
| **4.** | Click the **Apply Changes** button. |

There are additional tabs within the Content Object screen which users have the option to enter information. These tabs are not required to save the online content.

**Qualifications**

Managing students' requirements using qualifications, a group of related components, gives the user enhanced capabilities and control over their learning requirements. Within a qualification, a user can assign initial training periods, retraining intervals, and effective dates to components. In this section, steps are provided for

- Creating a qualification,
- Adding components to a created qualification,
- Assigning qualifications through job positions
- Revising existing qualifications.

*Creating Qualifications*

A user can create a qualification then identify the related components, documents, job location, job position, and sub qualifications associated. When a user creates a qualification, the user must do the following:

- Create an association with a domain(s)
- Determine the type of qualification
- Determine Components associated with the qualification

**Creating a Qualification**

| Step | Action |
|---|---|
| **1.** | Click the **Learning** link from the top navigation bar. |
| **2.** | Click the **Qualifications** link from the left navigation bar. The system will default to the Simple Search page. |
| **3.** | Click the **Add New** button at the top of the content frame. |
| **4.** | Enter a **Qualification ID** in the textbox. |
| **5.** | Enter a **Title** for the qualification in the textbox. |
| **6.** | Enter the **Creation Date** in the textbox<br><br>OR<br>• Click the Calendar Icon<br>• Select the appropriate **Creation Date** |
| **7.** | Click the **Active** checkbox if this is an active qualification. |
| **8.** | Enter a **Domain ID** for the component in the textbox<br><br>OR<br>Search for the **Domain ID**:<br>• Click the Blue Search Icon |

| | |
|---|---|
| | • Enter the search criteria for the **Domain ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Domain ID |
| **9.** | Enter a **Qualification Type** in the textbox<br>OR<br>Search for the **Qualification Type**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Qualification Type**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Qualification Type |
| **10.** | Enter a **Description** in the textbox. |
| **11.** | Click **Add** to save. The system will return to the Qualification Summary page. |
| **12.** | Select the **Components** tab. |
| **13.** | Under the sub-section Add A Component to Qualification click the **add one or more from list** link to add the components to the qualification. |
| **14.** | • Enter the search criteria for the component to add to the created qualification.<br>• Click the **Search** button |
| **15.** | Click the **Add** checkbox next to the components to include. |
| **16.** | Click on **Add** button to save. |
| **17.** | (Optional) To remove any of the added components,<br>• Click the **Remove** checkbox(s) next to the appropriate components<br>• Click the **Apply Changes** button<br>• The user may also click the **Edit** button to select the **Requirement Type** from the drop down list and update the **Effective Date**. |

### *Adding Components to an Existing Qualification*

A user can add additional components to a qualification that already exists in the system.

### Adding Components to an Existing Qualification

| Step | Action |
|---|---|
| **1.** | Click the **Learning** link from the top navigation bar. |
| **2.** | Click the **Qualifications** link from the left navigation bar. The system will default to the Simple Search page. |
| **3.** | • Enter the Search criteria for the qualification<br>• Click **Search** button to view the students<br>• From the list, select the qualification to want to add components in **Edit** mode. |
| **4.** | Select the **Components** tab from the Qualification Summary page. |
| **5.** | Click the **add one or more from list** link. |
| **6.** | • Enter the search criteria for the component(s) to add to the qualification<br>• Click the **Search** button |
| **7.** | Click the **Add** checkbox next to each component to add to the Qualification. |
| **8.** | Click the **Add** button. |
| **9.** | (Optional) If ) To remove any of the added components,<br><br>• Click the **Remove** checkbox(s) next to the appropriate components<br>• Click the **Apply Changes** button |
| **10.** | Click the **Edit** link next to the first component in the list. |
| **11.** | Enter an **Initial period** in the textbox. |
| **12.** | Enter a **Retraining interval** in the textbox. |
| **13.** | Enter an **Effective Date** in the textbox<br><br>OR<br>• Click the Calendar Icon<br>• Select the **Effective Date** |
| **14.** | Enter a Requirement Type in the textbox<br><br>OR<br>Search for the Requirement Type,<br>• Click the Blue Search Icon<br>• Click the **Select** button |
| **15.** | Click the **Apply Changes** button. The system will return to the Qualifications Summary page. |

*Adding a Qualification through a Job Position*

A user may also add qualifications for a student through a job position ID. A user can create a qualification that groups multiple components together and saves it as one learning unit associated to a specific Job Position ID. Below selected qualifications will be associated to a job position ID.

**Adding a Qualification through a Job Position**

| Step | Action |
|---|---|
| **1.** | Select the **References** link from the top navigation bar. |
| **2.** | Select the **Job Positions** link from the left navigation bar. The system will default to the Simple Search page. |
| **3.** | • Enter search criteria for the Job Position<br>• Click the **Search** button. |
| **4.** | From the list, select the **Edit** link next to one of the job positions to add a qualification(s). |
| **5.** | Click the **Qualifications** tab. |
| **6.** | Click the **add one or more from list** link to add a qualification to this job position. |
| **7.** | Click **Search** button to view a list. |
| **8.** | Select the **Qualification** to add to the job position. |
| **9.** | Click the **Add** button to save changes. |
| **10.** | (Optional) To remove any of the added components,<br><br>• Click the **Remove** checkbox(s) next to the appropriate components<br>• Click the **Apply Changes** button |

Existing Qualifications can be revised by searching and selecting the Component in **Edit** mode. If changes need to be made to an existing Qualification in the system, it would be performed by the following steps:

*Revising Qualifications*

**Revising Qualifications**

| Step | Action |
|---|---|
| **1.** | Click the **Learning** link from the top navigation bar. |
| **2.** | Click the **Components** link from the left navigation bar. The system will default to the Simple Search page. |
| **3.** | • Search for the component to revise<br>• Click the **Edit** link next to the appropriate component |

| | |
|---|---|
| **4.** | Click the **Revise** button. |
| **5.** | Enter the new **Revision Date** in the textbox<br><br>OR<br>• Click the Calendar Icon<br>• Select the new **Revision Date** |
| **6.** | Enter the **Revision Time** in the textbox, if necessary. |
| **7.** | Enter the **Time Zone ID** in the textbox<br><br>OR<br>• Click the Blue Search Icon<br>• Enter in search criteria for the Time Zone ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate Time Zone ID |
| **8.** | Enter a **Revision Number** in the textbox. |
| **9.** | Change the **Title,** if necessary. |
| **10.** | Click the **Next** button. |
| **11.** | Click the **Collateral Credit relationship** and **authorized instructors** checkboxes. |
| **12.** | Click the **Next** button. |
| **13.** | Click the **Make this component production ready** radio button. |
| **13.** | Click the **Next** button. |
| **14.** | Click all the appropriate checkboxes of the component revision process. |
| **15.** | Click the **Next** button. |
| **16.** | If this Component is part of a qualification(s),<br><br>• Review the Component settings within each qualification and<br>• Make any changes as necessary<br>• Click the **Next** button. |
| **17.** | Enter an **Effective Date** for the qualification(s) in the<br><br>OR<br>• Click the Calendar Icon<br>• Select the new **Effective Date**<br><br>Note: This will affect the status of the qualification. If the revised component is not completed by the effective date plus the number |

| | |
|---|---|
| | of days listed in the initial period field, the Qualification status will become "Incomplete." |
| **18.** | Click the **Next** button. |
| **19.** | Review the displayed information. |
| **20.** | Click the **Run Job Now** button.<br><br>Note: A user can select the **Schedule Job** button that allows a job to run later. |

*Viewing Component and Qualification records*

Users can also search and view existing components and qualifications already in the system. This is an important feature to have when creating learning assignments for students, adding components to a catalog, and creating qualifications.

**Viewing Component and Qualification records**

| Step | Action |
|---|---|
| **1.** | Click the **Learning** link from the top navigation bar. |
| **2.** | Click the **Components** link from the left navigation bar. The system will default to the Simple Search page. |
| **3.** | • Enter criteria for the component to view<br>• Click the **Search** button. |
| **4.** | Click the **View** link of the component to view. |
| **5.** | Click on the tabs to view the different features. |
| **6.** | Click the **Qualifications** link from the left navigation bar. The system will default to the Simple Search page. |
| **7.** | • Enter criteria for the qualification record(s) to be viewed<br>• Click the **Search** button |
| **8.** | Click the **Edit** Link of the qualification to view. |
| **9.** | Click on tabs of the qualification record to view the different features. |

## Catalogs

Catalogs contain components that are units of learning managed in the AgLearn system. Students can search catalogs for components and associated schedule instances that are only assigned to their domain or organization. If a component is not available for a student to search and enroll from a catalog, the student will have no access to that component. It is important to add all components a user wants a student in their organization to be able to view.

### *Adding a Component to a Catalog*

**Add Component to a Catalog**

| Step | Action |
|---|---|
| **1.** | Click the **Learning** link from the top navigation menu. |
| **2.** | Click the **Components** link from the left navigation menu. The system will default to the Simple Search page. |
| **3.** | • Enter the **Component ID** to add to a catalog,<br>• Click the **Search** button |
| **4.** | From the list of Components,<br>• Select the component to add to the catalog<br>• Click the **Edit** button. |
| **5.** | Click the **Catalogs** tab from the Components Summary page. |
| **6.** | Under the Add this Component to a Catalog section, Click the **add one or more from list** link. |
| **7.** | • Enter the search criteria for the desired catalog(s) by **Catalog ID** and/or **description**<br>• Click the **Search** button |
| **8.** | Check the **Add** checkbox(s) next to all catalogs in to add the component. |
| **9.** | Click the **Add** button. |
| **10.** | Verify that all selected catalogs are displayed. |

In this section, the following step-by-step procedures were performed:

- Created a Component
- Created an Online Object
- Created Qualifications
- Revised Qualifications
- Viewed Component and Qualification records
- Added Components to a Catalog

# SECTION IV: SCHEDULING

Scheduling is a core function of all training organizations. A user will use the Scheduling section to add, view, edit, or delete an instance to/from a learning schedule. The information tracked in this section includes where and when an instance will take place, who the instructor is, what students are enrolled or waitlisted, the instance's enrollment domains and what the pre-work and post-work material requirements will be. Users can also edit/view custom fields and notification messages for an instance.

This section covers the concept of the following:

- Creating a Schedule Instance
  - Assigning Resources to Segments
  - Copying Daily Segments
  - Modifying an Instance Notification
  - Setting Enrollment Parameters
  - Copying a Schedule Instance with No Supervisor Approval Required
  - Copying a Schedule Instance – Past Date
- View Schedule Instance
- Enrolling in a Schedule Instance
  - Administrator Enrolling Students
  - Reserving Slots for a Schedule Instance
- Scheduling a Qualification
  - Scheduling a Qualification
  - Adding a Scheduled Qualification to a Class

**SECTION TERMINOLOGY**

| | |
|---|---|
| **Schedule Instances** | Events scheduled on a training calendar |
| **Segments** | Portion of time in a day when Instances can be scheduled |

*Creating a Schedule Instance*

When creating an instance, users have the option to select a schedule instance for a component or an activity. A schedule instance, or instance, is a specific scheduled learning event, such as "the HR101 class scheduled for October 15 in Room 320 at the Main Office." An activity is a non-component activity a user can add to the learning calendar. Typical activities include instructor vacations, location unavailability, meetings, workshops, and course development activities. Activities allow users to indicate periods of time during which various resources are unavailable.

Activities are similar to schedule instances in that they are both events that appear on the learning calendar.

An active instance refers to an instance that can currently be viewed and updated by users who have proper domain permissions. If the Active checkbox is not selected, the instance becomes inactive and unavailable for users to view or edit unless they have been assigned permission for inactive items. By default, instances are always active when created.

**Creating an Active Schedule Instance**

| Step | Action |
|---|---|
| **1.** | Click the **Scheduling** link from the top navigation bar. |
| **2.** | Click the **Schedule Instances** link from the left navigation bar. |
| **3.** | Click the **Add New** link. |
| **4.** | Select the **Component** radio button.<br><br>Note: If creating a schedule instance for an Activity, select the **Activity** button. |
| **5.** | Click the **Next** button. |
| **6.** | Select the **Component Type** from the drop-down menu.<br><br>Note: If creating a schedule instance for an Activity, select the **Activity Type**. |
| | Enter the **Component ID** in the textbox.<br>OR<br>Search for the **Component ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Component ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Component ID<br><br>Note: If creating a schedule instance for an Activity, enter the **Activity ID**. |
| **7.** | Enter the **Segment Start Date** of the schedule instance in the textbox<br>OR<br>• Click the Calendar Icon<br>• Select the **Segment Start Date** |

| | |
|---|---|
| **8.** | Enter a **Segment Start Time** in the textbox. |
| **9.** | Enter the **Time Zone ID** in the textbox.<br>OR<br>Search for the **Time Zone ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Time Zone ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Time Zone ID |
| **10.** | Enter the **Domain ID** in the textbox.<br>OR<br>Search for the **Domain ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Domain ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Domain ID |
| **11.** | Enter a **Contact name** and **E-mail** for the schedule instance. |
| **12.** | Enter in the remaining textbox(s), where applicable. |
| **13.** | Click the **Active** checkbox (if not an active instance, do not click this checkbox) |
| **14.** | Click the **Add** button. |

*Assigning Resources to Segments*

Segments are the building blocks of time for a schedule instance. A user can divide a schedule instance's time into as many segments, pieces of time, as needed. For example, a 40-hour course can be divided into five 8-hour segments, scheduled one segment per day for five days. From the Segments tab, within the Scheduling section of AgLearn, a user can do the following:

- Assign Equipment and Material types to a Segment
- Assign one or many Instructors to a Segment
- Assign a location to a Segment

Below are steps for assigning an Instructor to a Segment. Follow the same steps for assigning a location, equipment, and material type but click on the appropriate tab (i.e. Instructor, Location, Material, etc).

### Assign Resources (Instructor) to Segments

| Step | Action |
|---|---|
| **1.** | Click the **Segments** tab from the Schedule Instance Summary page. |
| **2.** | Enter the **Primary Instructor** in the textbox<br><br>OR<br>Search for the Primary Instructor,<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Primary Instructor ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Primary Instructor ID<br><br>**Not**e: When searching for an instructor, the search screen defaults with the component information entered as search criterion. If this criterion is not cleared, only Instructors that are authorized to teach this component will be listed. |
| **3.** | Enter the **Primary Location ID** in the textbox<br><br>OR<br>Search for the Primary Location,<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Primary Location ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the selected Primary Location ID |
| **4.** | Click the **Send Notification** and **Check Conflicts** checkboxes. |
| **5.** | Click the **Apply Changes** button. |
| **6.** | Click the **Edit** link for on of the segment under the Update the Segment for the Schedule Instance section. |
| **7.** | Click the **Instructors** tab.<br><br>Note: if adding a resource other than an Instructor (Equipment, Material, or Location)<br>• Click the appropriate tab and continue with Step 8.<br>• Instead of searching for an **Instructo**r, search for the appropriate resource (material, equipment, or location). |

| | |
|---|---|
| **8.** | Search for an **Instructor** by entering the Instructor ID<br><br>OR<br>• Click the **add one or more to list** link<br>• Click the **Search** button |
| **9.** | Check the **Add** box next to the desired instructor; do not check the **Primary** radio button.<br><br>This instructor will now be scheduled for the Instance as a second instructor. |
| **10.** | Click the **Add** button. |
| **11.** | Click the Return to schedule instances button. |

*Copying Daily Segments*

All instances are divided into segments. By default, each instance has one segment. To create more than one segment for a schedule instance, a user can Copy the Daily Segment as many times as needed than modify the description and Start/End time to reflect the new segment of the Instance.

**Copy Daily Segments**

| Step | Action |
|---|---|
| **1.** | Click the **Segments** tab from the Schedule Instance page. |
| **2.** | Click the **Copy Daily Segments** link next to the segment to copy under the Update the Segment for the Schedule Instance section. |
| **3.** | Enter the number of times to copy the segment in the textbox.<br><br>**Not**e: This will create each duplicate Segment(s) on a different day. A user can modify the new segment dates and time once they are created. |
| **4.** | Click the **Copy** button. |
| **5.** | Under the Update the Segment for the Schedule Instance section, View the new Segments.<br><br>Note: Resources assigned to the original segment will be carried over to the new Segment(s). |
| **6.** | Modify the **Description** for each new segment. |
| **7.** | Enter the **Start Date, Start Time** to reflect the new segment date & time in the textbox(s). |
| **8.** | Enter the **End Date, End time** to reflect the new segment date & |

| | |
|---|---|
| | time in the textboxes. |
| **9.** | Click the **Apply changes** button. |

*Modify an Instance Notification*

The Schedule Instance notification option allows users to specify content sent to students, instructors, supervisors, and other specified contacts regarding scheduling information for a specific instance. An instance notification is sent out via email when a schedule instance status or detail changes.

**Modify an Instance Notification**

| Step | Action |
|---|---|
| **1.** | From the Schedule Instance screen, Click the **Notifications** tab. |
| **2.** | Scroll down to the Edit the Enrollment Notification for the Schedule Instance section. |
| **3.** | In the body of the message, add the necessary test to include on the instance notification. |
| **4.** | Click the **Apply Changes** button. |

*Setting Enrollment Parameters*

Student enrollment has two options: 1) supervisory approval is required before enrollment or 2) users may self enroll into a learning activity. The self-enrollment option lets students enroll themselves into an instance via the Student User Interface. The required Supervisor Approval option lets supervisors review and approve requested enrollments by their subordinates before students are enrolled. Enrollment with required supervisory approval will not reserve a seat in the class for a student until the supervisor has approved the enrollment.

**Set Enrollment Parameters**

| Step | Action |
|---|---|
| **1.** | Click the **Enrollment** tab from the Schedule Instance Section |
| **2.** | Under the Edit the Enrollment for the Schedule Instance Section:<br><br>Enter an **Enrollment cutoff date** in the textbox<br><br>OR<br>• Click the Calendar Icon<br>• Select the **Enrollment cutoff date** |
| **3.** | Enter an **Enrollment cutoff time** in the textbox. |

| | |
|---|---|
| **4.** | Enter the **minimum Enrollment** in the textbox. |
| **5.** | Enter the **maximum Enrollment** in the textbox. |
| **6a.** | Click the **Self Enrollment** checkbox.<br><br>**Not**e: This will allow students to sign-up for this course from the student interface.<br><br>OR<br><br>Click the **Require Supervisor Approval** checkbox.<br><br>**Not**e: This will give students a status of "pending" after they self enroll until the supervisor gives approval to enroll. |
| **7.** | Click the **Apply Changes** button. |
| **8.** | Click the **Catalog** tab. |
| **9.** | View all the catalogs where this Instance will be displayed. Students that can view these catalogs will have the ability to self-enroll in the instance (will be given status of pending until their supervisor approves). |

*Copying a Schedule Instance – No Supervisor Approval Required*

AgLearn gives a user the flexibility of copying a schedule instance instead of creating an entirely new instance. A user may want to copy a schedule instance when the information entered is similar or for a matching component. The below steps are for a Self Enrolled Schedule Instance.

**Copy a Schedule Instance – No Supervisor Approval Required (Self Enrollment)**

| Step | Action |
|---|---|
| **1.** | Click the **Summary** tab from the Schedule Instance Screen. |
| **2.** | Click the **Copy Schedule Instance…** button. |
| **3.** | Enter the **New Start Date** in the textbox<br><br>OR<br>• Click the Calendar Icon<br>• Select the **New Start date** |
| **4.** | Click (uncheck) the **Copy Group Instance** checkbox. |
| **5.** | Click the **Copy New Schedule to the Catalog** checkbox. |
| **6.** | Click the **Override adjusted enrollment cut-off date** checkbox. |
| **7.** | Enter the **new Cut-off Date** in the textbox |

| | |
|---|---|
| | OR<br>• Click the Calendar Icon<br>• Select the **new Cutoff Date** |
| **8.** | Enter the **Cut-off Time** in the textbox. |
| **9.** | Click the **Use Component default Segment day numbers** checkbox. |
| **10.** | Click **the Schedule On: Monday, Tuesday, Wednesday, Thursday, and Friday** checkboxes.<br><br>Note: This options allows students to enroll in the course Mon-Fri |
| **11.** | Click the **Send Notification** checkbox.<br><br>Note: The option sends a notification of enrollment. |
| **12.** | Click the **Copy** button. |
| **13.** | Click the **Enrollment** tab. |
| **14.** | (Optional) Click the **Self Enrollment** Checkbox.<br><br>Note: This lets students enroll for the course on their own. |
| **15.** | (Optional) Click the **Require Supervisor approval** checkbox.<br><br>Note: This requires a student to receive approval from their supervisor to enroll in the course. |
| **16.** | Click the **Apply Changes** button. |

*Viewing a Schedule Instance*

Users can search for a schedule instance by entering in specific search criteria. If the Schedule ID is not known, a user can easily locate and access the schedule instances using the Calendar view, as shown below.

**Searching and Viewing a Scheduled Instance**

| Step | Action |
|---|---|
| **1.** | Click the **Scheduling** link from the top navigation bar. |
| **2.** | Click the **Schedule Instances** link from the left navigation bar. |
| **3.** | Enter a **Start Date** and **End Date** in the Start Date between…and… textboxes<br><br>OR |

| | |
|---|---|
| | • Click the Calendar Icon<br>• Select the **Start and End Dates**. |
| **4.** | Click the **Search** button. |
| **5.** | Click the **Calendar View** tab |
| **6.** | Hover the mouse over a Schedule ID. The component title will display in a yellow pop-up box. |
| **7.** | Click the Schedule ID link to access the schedule instance in **View** Mode. |
| **8.** | To return to the search results, click the **Search Results** link, then click the **Calendar View** tab at the top of the page. |

*Enrolling a Student in a Schedule Instance*

When a Student needs to enroll in a schedule instance that requires supervisory approval, the following steps are to be followed by the administrator.

**Enroll Students - Administrator**

| Step | Action |
|---|---|
| **1.** | Click the **Scheduling** link from the top navigation bar. |
| **2.** | Click the **Schedule Instances** link from the left navigation bar. |
| **3.** | Search for and access, in **Edit** Mode, the Schedule Instance to enroll Student. |
| **4.** | Click the **Enrollment** tab. |
| **5.** | In the Add a Student to Schedule Instance Enrollment section, click **the add one or more from list** link. |
| **6.** | • Enter search criteria for the student(s) to enroll in this Instance by Student ID or Student Name<br>• Click the **Search** button |
| **7.** | Click the **Add** box next to each student that to enroll. |
| **8.** | Check the **E-Mail checkboxes** for the people to receive confirmation for this instance:<br>• **Student**<br>• **Supervisors**<br>• **and/or Contacts**<br><br>**Not**e: It is recommended to check all boxes.<br>• Instructors and Supervisors will get one e-mail notification. |

| | |
|---|---|
| | • Supervisors will get their subordinates' names in the e-mail<br>• Instructors will get an email listing everyone enrolled in the class. |
| **9.** | Click the **Add** button. |
| **10.** | Verify that the students were enrolled in the instance. |

*Reserving Slots for a Schedule Instance*

A slot is a reservation made by an organization to reserve enrollments for students in to a schedule instance. A reservation can be made for one or many students. Slot requests are recorded using the Enrollment tab in the Schedule Instances section or by using the Enrollment Assistant tool. To reserve a slot in a schedule instance, the user does not need to enter a specific student's name or ID at the time the reservation is made.

**Reserve Slots for a Schedule Instance**

| Step | Action |
|---|---|
| **1.** | Click the **Enrollment** tab from the Schedule Instance Summary page. |
| **2.** | In the Add Slots to the Scheduled Instance section, enter the **Organization** for the slots will be reserved for in the textbox<br><br>OR<br>• Click the Blue Search Icon<br>• Enter the criteria to search for the Organization ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate Organization ID |
| **3.** | Enter the **Number of Slots to be Reserved** in the textbox. |
| **4.** | Enter the **Reservation Date** in the textbox<br><br>OR<br>• Click the Calendar Icon<br>• Select the **Reservation Date** |
| **5.** | Enter the **Reservation Time** in the textbox. |
| **6.** | Enter the **Time Zone ID** in the textbox.<br>OR<br>Search for the **Time Zone ID**:<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Time Zone ID** |

| | |
|---|---|
| | • Click the **Search** button<br>• Click the **Select** button next to the selected Time Zone ID |
| **7.** | Select an **Enrollment Status** for slot reservations in the textbox. |
| **8.** | Click the **Email confirmation to the Organization** checkbox. |
| **9.** | Click the **Add** button. |

*Scheduling a Qualification*

Users can schedule a qualification without having to create schedule instances for each individual component associated with the qualification. Instead, a user can schedule it as one unit. For example, schedule all of a qualification's components during one class.

**Schedule a Qualification**

| Step | Action |
|---|---|
| **1.** | Click the **Scheduling** link from the top navigation bar. |
| **2.** | Click the **Qualifications Scheduling** link from the left navigation bar. |
| **3.** | Enter the **Qualification ID** in the textbox<br>OR<br>Search for the **Qualification ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the **Qualification ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **4.** | Click the **Next** button. |
| **5.** | Enter a **Start Date** in the textbox<br>OR<br>• Click the Calendar Icon<br>• Select the **Start Date** |
| **6.** | Enter a **Start Time** in the textbox. |
| **7.** | Enter the **Domain ID** in the textbox<br>OR<br>Search for the **Domain ID:**<br>• Click the Blue Search Icon |

| | |
|---|---|
| | • Enter the search criteria for the **Domain ID**<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **8.** | Click the **Send Notifications** checkbox. |
| **9.** | Click the **Next** button. |
| **10.** | Verify all information is correct. |
| **11.** | Click the **Finish** button. |
| **12.** | Click the **Start Over** button. |

A qualification was just scheduled, now the user can add a class to the qualification.

*Schedule a Qualification and Adding It to a Class*

**Schedule a Qualification and Add to a Class**

| Step | Action |
|---|---|
| **1.** | Click the **Scheduling link** from the top navigation bar. |
| **2.** | Click the **Qualifications Scheduling** link from the left navigation bar. |
| **3.** | Enter the **Qualification ID** in the textbox<br>OR<br>Search for the **Qualification ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Qualification ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **4.** | Click the **Next** button. |
| **5.** | Enter a **Start Date** in the textbox<br>OR<br>• Click the Calendar Icon<br>• Select the **Start Date** |
| **6.** | Enter a **Start Time** in the textbox. |
| **7.** | Enter the **Domain ID** in the textbox<br>OR |

| | |
|---|---|
| | Search for the **Domain ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Domain ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **8.** | Click the **Send Notifications** checkbox. |
| **9.** | Click the **Add the Schedules to a Class** checkbox. |
| **10.** | Click the **Next** button. |
| **11.** | Enter a **Class ID** in the textbox<br><br>OR<br>Search for the **Class ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Class ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **12.** | Click the **Next** button. |
| **13.** | Verify all information is correct. |
| **14.** | Click the **Finish** button. |
| **15.** | Click the **Go to Class…** button. |
| **16.** | Click the **Schedules** tab. |
| **17.** | Under the Update the Schedule Instance to the Class section:<br><br>Click the **Auto Enroll** checkbox for each Instance. |
| **18.** | Click the **Apply Changes** button. |

# SECTION V: RESOURCES

Resources are assets whose availability is essential to a user's ability to schedule an instance. Use this section to monitor and manage Materials, Equipment, Instructors, Locations, and Custom Resources in the organization.

In this section, AgLearn helps manage the following resources and functions:

- **Creating Resources**
  - Creating Materials
  - Creating Equipment
  - Creating an Instructor
  - Adding Authorized Components to an Instructor
  - Creating a location
  - Creating a Facility
  - Associating a Location to a Facility
- **Viewing material, equipment, location, instructor, facility, and region**
- **Creating a Class**
  - Creating a Class
  - Adding Schedule Instances to the Class
  - Setting Enrollment Tools for the Class
  - Adding Student to the Class

**Section Terminology**

| | |
|---|---|
| **Materials** | Actual consumables that are delivered along with the other aspects of training |
| **Equipment** | Tools used to deliver training (I.e. Textbook, Projector) |
| **Instructors** | Person responsible for delivering or facilitating training |
| **Location** | A portion of a facility, i.e. conference room |
| **Facility** | Identified as a building, or if a large plant. Groups of Locations |
| **Class** | A group of existing students and Schedule Instances associated with a particular group Instance Name. |

### Creating Resources

Resources can be created and assigned in AgLearn under the following categories: Materials, Equipment, Instructors, Location, and Facility. Below a resource will be created for each category.

*Creating a Material*

When creating materials in the system, users have the option to associate the materials to a specific facility. For example, if Training 101 textbooks are only located at the 401 School St. Building a user would associate that Facility ID with those materials. When a user searches for locations requiring Training 101 textbooks, the 401 School St. Building would be included in the list of results.

**Creating a Material**

| Step | Action |
|---|---|
| **1.** | Click the **Resources** link from the top navigation bar. |
| **2.** | Click the **Materials** link from the left navigation bar. |
| **3.** | Click the **Add New** link. |
| **4.** | Enter a **Material ID** in the textbox. |
| **5.** | Enter the **Description** in the textbox**.** |
| **6.** | Enter the **Domain ID** in the textbox<br>OR<br>Search for the **Domain ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Domain ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **7.** | Click the **Inventory** tab from the Material Summary page. |
| **8.** | Enter the Facility ID or Click the **add one or more to the list** button. |
| **9.** | • Enter search criteria for the Facility ID<br>• Click the **Search** button<br>• Select the **Facility ID** where to add the materials<br>• Click the **Add** checkbox |
| **10.** | Click the **Add** button |

An association between materials and a specific facility is made. Now an equipment resource can be created.

*Creating Equipment*

When creating equipment in the AgLearn system, users have the option to associate the equipment to a specific location. For example, if white boards are only located at the 401 School St. Building: Conference Room C, users would associate that Location ID with the equipment ID. Then when a user needs to request white boards, the system will indicate 401 School St. Building Conference Room C is equipped with their request for white boards.

**Creating Equipment**

| Step | Action |
|---|---|
| **1.** | Click the **Resources** link from the top navigation bar. |
| **2.** | Click the **Equipment** link from the left navigation bar. |
| **3.** | Click the **Add New** link. |
| **4.** | Enter an **Equipment ID** in the textbox. |
| **5.** | Enter the **Description** in the textbox**.** |
| **6.** | Enter the **Domain ID** in the textbox<br>OR<br>Search for the **Domain ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Domain ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **7.** | Enter the **Employee Type** in the textbox<br>OR<br>Search for the **Employee Type:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Employee Type<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **8.** | Enter the **Employee Status** in the textbox<br>OR |

| | |
|---|---|
| | Search for the **Employee Status:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Employee Status<br>• Click the **Search** button<br>• Click the **Select** button next to the Employee Status |
| **9.** | Click the **Summary** tab. |
| **10.** | Enter the **Assigned Location ID**<br><br>OR<br>Search for the **Assigned Location ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Assigned Location ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID. |
| **11.** | Click the **Add** button. |
| **12.** | Click the **Apply Changes** button. |

An association between equipment and a specific location has been created. Now an instructor resource will be created. Instructors are required when creating and assigning an Instructor led training course.

*Creating an Instructor*

An instructor in AgLearn is a person who delivers training to a group of students. Although any person can be indicated as an instructor when recording learning events, instructors can also be assigned a list of components that they are only authorized to teach.

Below are step-by-step instructions for creating an instructor that is authorized to teach all components.

**Creating an Instructor**

| Step | Action |
|---|---|
| **1.** | Click the **Resources** link from the top navigation bar. |
| **2.** | Click the **Instructors** link from the left navigation bar. |
| **3.** | Click the **Add New** link. |
| **4.** | Enter an **Instructor ID** in the textbox. |
| **5.** | Enter the **Instructor's Name** in the textboxes. |

| | |
|---|---|
| **6.** | Enter the **Domain ID** in the textbox<br>OR<br>Search for the **Domain ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Domain ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **7.** | Enter the **Organization** in the textbox<br>OR<br>Search for the **Organization:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Organization<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **8.** | Enter an **e-mail address** for the instructor.<br><br>(Optional) It is recommended to enter an e-mail address so that the Instructor will receive all Schedule Instance Notifications. |
| **9.** | Click the **Active** Checkbox if the Instructor is active. |
| **10.** | Click the **Add** button. |

*Adding Authorized Components to an Instructor*

Some instructors have specific skills and can be limited to teach only components associated with those skills. A list of components that an instructor is authorized to teach can be created to help improve the process of selecting and scheduling instructors to teach courses that fit to their skills. If an instructor can only teach specific components, only courses associated with that component will allow the instructor to be created for the course.

**Adding Authorized Components to an Instructor**

| Step | Action |
|---|---|
| **1.** | From the Instructor record, click the **Authorized** tab. |
| **2.** | Under the Add a Component to the Instructor Authorized Components, Click **the add one or more from list** link. |
| **3.** | Search for the Component(s) that to add to the Instructor's authorized list,<br>• Enter the search criteria for the component |

| | |
|---|---|
| | • Click the **Search** button |
| **4.** | Click the **Add** checkbox next to all components to add to the Instructor's authorized list. |
| **5.** | Click the **Add** button. |
| **6.** | Verify that all selected Components were added to the Instructor's record. |

*Creating a Location*

Locations are required for courses, seminars, etc. when a physical location is needed in order for students to participate in the learning event.

**Creating a Location**

| Step | Action |
|---|---|
| **1.** | Click the **Resources** link from the top navigation bar. |
| **2.** | Select the **Locations** link from the left navigation bar. |
| **3.** | Click the **Add New** link. |
| **4.** | Enter a **Location ID**. |
| **5.** | Enter the **Location Description.** |
| **6.** | Enter the **Domain ID** in the textbox<br>OR<br>Search for the **Domain ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Domain ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **7.** | Enter the **Location Type** in the textbox**:**<br><br>OR<br>Search for the **Location Type:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Location Type<br>• Click the **Search** button<br>• Click the **Select** button next to the Location Type |

| | |
|---|---|
| **8.** | Enter the **Facility ID** in the textbox:<br><br>OR<br>Search for the **Facility ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Facility ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **9.** | Enter the **Max. capacity** for the location in the textbox. |
| **10.** | Enter a **Contact Name** for this location in the textbox. |
| **11.** | Click the **Add** button. |

*Creating a Facility*

A location has now been created. Next, a facility resource will be created. Locations can be associated to a facility however, it is not required. For example, a location is an area or room within a facility (building).

Note: Users do not have to create a Facility to use the Location resource. A user can create a facility separately from a location.

**Creating a Facility**

| Step | Action |
|---|---|
| **1.** | Click the **Resources** link from the top navigation bar. |
| **2.** | Select the **Facilities** link from the left navigation bar. |
| **3.** | Click the **Add New** link. |
| **4.** | Enter a **Facility ID**. |
| **5.** | Enter the **Facility Description.** |
| **6.** | Enter the **Domain ID** in the textbox<br>OR<br>Search for the **Domain ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Domain ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |

| | |
|---|---|
| **7.** | (Optional) Enter the Holiday Profile, Time Zone, and Work Week Profile for the facility in the textboxes provided. |
| **8.** | Click the **Add** button. |
| **9.** | Click the **Contact** tab. |
| **10.** | (Optional) Enter the facility's contact information. |
| **11.** | Click the **Apply Changes** button. |
| **12.** | Click the **Locations** tab. |
| **13.** | Click the **add one or more to the list** link. |
| **14.** | Search for the Location to associate to the facility,<br>• Enter the search criteria for the Location<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate Location ID |
| **15.** | Click the **Add** checkbox next to all locations to add to the facility. |
| **16.** | Click the **Add** button. |
| **17.** | Verify that all selected Locations were added to the facility |

Resources are now created. Next, a user can view the resources just added.

### Viewing material, equipment, location, instructor, facility, and region

**View material, equipment, location, instructor, facility, and region**

| Step | Action |
|---|---|
| **1.** | Click the **Resources** link from the top navigation bar. |
| **2.** | Click the **Facilities** link from the left navigation bar. The system will default to the Simple Search page. |
| **3.** | Without entering any criteria, click the **Search** button to see a list of all available facilities. |
| **4.** | Click the **View** link for the facility to view. |
| **5.** | Review the tabs within the facilities record. |
| **6.** | Repeat these steps to view **Materials, Equipment, Locations, Instructors**, and **Regions** by clicking on the appropriate left navigation bar link. Refer to Step 2. |

## Classes

Classes allow users to create a group of students that will progress through the same set of specified schedule instances. Creating classes makes the reporting and scheduling of a group much easier for an administrator. While classes generally include a list of students with related schedule instances, it is important to note that users can have students in the same class but do not share all of the same learning needs and events on their development plans.

Once a class has been created, users can perform the following functions,

- Add Scheduled Instances
- Set Enrollment rule to the class
- Add students to a class

*Creating a Class*

The first step in enrolling students into a class is creating the actual class itself. Once the class is created in the system, the administrator will

- Set enrollment rules
- Allow student to enroll in the class

**Create a Class**

| Step | Action |
|---|---|
| **1.** | Click the **Scheduling** link from the top navigation bar. |
| **2.** | Click the **Classes** link from the left navigation bar. |
| **3.** | Click the **Add New** link. |
| **4.** | Enter an **Class ID**. |
| **5.** | Enter the **Class Description** |
| **6.** | Enter the **Domain ID** in the textbox<br>OR<br>Search for the **Domain ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Domain ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **7.** | Enter the **Qualification ID** in the textbox<br>OR<br>Search for the **Qualification ID:** |

| | |
|---|---|
| | • Click the Blue Search Icon<br>• Enter the search criteria for the Qualification ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |
| **8.** | Enter the **maximum size** (number of students) for the class in the textbox. |
| **9.** | Enter a **Start Date** in the textbox<br><br>OR<br>• Click the Calendar Icon<br>• Select the **Start Date** |
| **10.** | Enter a **End Date** in the textbox<br><br>OR<br>• Click the Calendar Icon<br>• Select the **End Date** |
| **11.** | Click the **Add** button. |

*Adding Scheduled Instances to the Class*

A class usually takes place at a certain date, time and place.  To set up a class at a certain date and time, a schedule instance needs to be created.

**Add Schedule Instances to the Class**

| Step | Action |
|---|---|
| **1.** | Click the **Schedule** tab from the Class Summary page. |
| **2.** | Under the Add a Schedule Instance to the Class, Click the **add one or more to the list** link. |
| **3.** | Search for the Schedule Instances to add to the class. |
| **4.** | (Optional) Check the **Add** and **Auto Enroll** checkbox next to each schedule instance to add to the class.<br><br>**Not**e: If seats are available in a schedule instance, select Auto Enroll and students in the class are automatically enrolled in the Instance. |
| **5.** | Click the **Add** button. |

*Enrollment Rules for a Class*

Enrollment Rules for a class may be the cost of the class, class requirements, or pre-requisites a student must do prior to the start date of the class. Enrollment Rules are requirements a student must follow in order to be enrolled in the class. Self enrollment is an enrollment rule that can be set for a class. If a class does not permit a student to self enroll, a rule will prohibit any uses from enrolling themselves into the class.

AgLearn also allows users the functionality to send out a notification email to students, instructors, and supervisors informing them of these enrollment rules: charges, requirements, etc. For example, in the notification email it may require students to purchase a book or bring a list of materials to class.

**Setting Enrollment Rules for the Class**

| Step | Action |
|---|---|
| **1.** | Click the **Enrollment Rules** tab. |
| **2.** | Select the Enrollment status: **Enrolled** from the drop-down menu. |
| **3.** | Click the **No charge** radio button.<br><br>Note: Only select if this is a free, no charge class. |
| **4.** | Click (Uncheck) the **Development Plan** checkbox in the Unenrollment Rules section. |
| **5.** | Click the appropriate **Notification boxes** in the Notification Rules section.<br>Email Notifications for:<br>• Student<br>• Instructor<br>• Supervisor<br>• Contacts<br><br>Note: An email to the student should always be sent. Users can send to the other choices, when applicable. |
| **6.** | Click the **Apply Changes** button. |

*Adding Students to a Class*

In order for a student to take a specific class, he/she must enroll in the schedule instance associated with the class. Students may self-enroll into classes/schedule instances depending on the agency's policies and the class's enrollments rules. Some classes and agencies will not permit a student to self enroll. If self-enrollment is not an option, the student will have to request the class (schedule instance) through their supervisor or training officer. When a student makes a request to be added to a class, below are steps for how an administrator can add a student.

### Add Students to the Class

| Step | Action |
|---|---|
| **1.** | Click the **Students** tab. |
| **2.** | Under the Add a Student to the Class section, Click the **add one or more from list** link. |
| **3.** | Search for all students to add to the class.<br><br>**Not**e: New student record may be added by clicking the Create **and Add New Student…** button. |
| **4.** | Click the **Selec**t checkbox next to all students to add to the class. |
| **5.** | Click the **Add** button. |
| **6.** | Verify that all students selected as part of the class. |
| **7.** | Verify that the students are enrolled in the schedule instances that were selected by the Auto Enroll default for the class. Access the Schedule Instance or Individual Student record to verify. |
| **8.** | (Optional) To move a Student to another class,<br><br>• Click **move to another class** button<br>• Enter in the new Class ID<br>**OR**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Student<br>• Click the **Search** button<br>• Click the **Select** button |
| | Click the **Remove Old Class Notification** checkbox. |
| **10.** | Click the **Move** button. |
| **11.** | (Optional) To remove any of the Added Students,<br><br>• Click the **Remove** checkbox(s) next to the appropriate Students<br>• Click the **Apply Changes** button |

## SECTION VI: REPORTING

AgLearn's reporting tools enable users to run a variety of reports on almost every aspect of training in an organization. The reporting system contains over 60 standard report types with each report menu giving users the option of grouping and sorting the output in various ways. All standard reports are exported into Adobe PDF format and printable.

Users can access the reporting tools by clicking the **Reports** link on the top navigation bar. The user can then select from a variety of report types by clicking the appropriate link on the left navigation bar. Depending on the reporting fields, the user will be prompted to enter in information then click the **Run Report** button to generate the report.

Below is a list of all the reporting groups:

- **Student Reports**
    - Certificate of Completion
    - Student Component Status
    - Student Conflict
    - Student Data
    - Student Development Plan
    - Student Online Component Status Report
    - Student Qualification Status
    - Student Self-Enrollment/Unenrollment
    - Student Self-Registration
    - Student Learning History
    - Student Learning Hours
    - Student Learning Needs
- **Document Reports**
    - Document Date Report
    - Document Review Flag Report
- **Resource Reports**
    - Custom Resource Data
    - Equipment Data
    - Equipment Status
    - Equipment Utilization
    - Facility Data
    - Instructor Data
    - Instructor Data
    - Instructor Proctor Codes
    - Location Data
    - Location Utilization
    - Material Data
    - Region Data
    - Resource Conflict
- **Enrollment Reports**
    - Class Roster
    - Component Requests
    - Enrollment Confirmation

  - Enrollment Status
  - Slot Status
- **Scheduling Reports**
  - Class Data Report
  - Class Location Report
  - Class Progress Report
  - Certificate of Completion
  - Schedule Instance Data
  - Learning Center
- **Component and Qualification Reports**
  - Collateral Credit Relationship
  - Component Data
  - Components with Related Documents
  - Component Object Details
  - Components with Prerequisite Components
  - Qualification Data
  - Qualifications with Related Job Positions
- **Exam/Survey Reports**
  - Exam and Survey Objects
  - Student Exam and Survey Data
- **Reference Reports**
  - Component List
  - Holiday Profile
  - Job Position Detail
  - List Reports
  - Work Week Profile

## SECTION VII: COMMERCE

The Commerce section of AgLearn is designed to help users track and update transactions of students and/or organizations in the LMS. The AgLearn system manages the use of the items offered in the catalogs and tracks the costs associated with the components and materials. In this section, users will perform the following functions:

- Catalogs
  - Creating a New Catalog
  - Editing a Catalog

### Catalogs

Catalogs help control what components and its associated schedule instances are available for students to view and enroll in the AgLearn system. Components and schedule instances can be added to multiple catalogs depending on the domain(s) and organization(s) assigned to the catalog when created.

Once a catalog is created, an administrator will need to determine what user domains and organizations will have access to view the catalog. Depending on a student's domain restrictions and associated organizations, not all students will be able to view the same catalogs. Catalogs may be broken down by employment type, USDA agencies, job positions, etc. Each agency will determine how they will setup their individual catalogs.

*Creating a New Catalog*

**Creating a New Catalog**

| Step | Action |
|---|---|
| **1.** | Click the **Commerce** link from the top navigation bar. |
| **2.** | Click the **Catalog** link from the left navigation bar. |
| **3.** | Click the **Add New** link. |
| **4.** | Enter a **Catalog ID**. |
| **5.** | Enter the **Class Description** |
| **6.** | Enter the **Domain ID** in the textbox<br>OR<br>Search for the **Domain ID:**<br>• Click the Blue Search Icon<br>• Enter the search criteria for the Domain ID<br>• Click the **Search** button<br>• Click the **Select** button next to the appropriate ID |

<table>
<tr><td>7.</td><td>Enter the Pricing Rule ID in the textbox<br>OR<br>Search for the Pricing Rule ID:<ul><li>Click the Blue Search Icon</li><li>Enter the search criteria for the Pricing Rule ID</li><li>Click the Search button</li><li>Click the Select button next to the appropriate ID</li></ul></td></tr>
<tr><td>8.</td><td>Click the Active checkbox to make this catalog active.</td></tr>
<tr><td>9.</td><td>Click the Add button.</td></tr>
<tr><td>10.</td><td>Select the Domain tab to add a domain(s) to the catalog.</td></tr>
<tr><td>11.</td><td>Click the add one or many from list link.</td></tr>
<tr><td>12.</td><td><ul><li>Search for the Domains to add to this catalog.</li><li>Click the Add checkbox next to each domain to add.</li></ul></td></tr>
<tr><td>13.</td><td>Click the Add button.</td></tr>
<tr><td>14.</td><td>(Optional) To remove any of the added domains,<ul><li>Click the Remove checkbox(s) next to the appropriate Domain</li><li>Click the Apply Changes button</li></ul></td></tr>
<tr><td>15.</td><td>Select the Organization tab.</td></tr>
<tr><td>16.</td><td>Click the add one or many from list link.</td></tr>
<tr><td>17.</td><td><ul><li>Enter the search criteria for the Organizations to add to this catalog.</li><li>Click the Search button</li><li>Click the Add checkbox next to each domain to add.</li></ul></td></tr>
<tr><td>18.</td><td>Click the Add button.</td></tr>
<tr><td>19.</td><td>Optional) To remove any of the added organizations,<ul><li>Click the Remove checkbox(s) next to the appropriate Organization</li><li>Click the Apply Changes button.</li></ul></td></tr>
</table>

*Editing a Catalog*

When a catalog is already created in the system, a user can search for the existing catalog and make changes to it.  Changes may be made to a catalog's domains and/or organizations to allow/prevent additional student access.  Component details in a catalog can also be added, modified, or deleted using this function as well.

**Editing a Catalog**

| Step | Action |
|---|---|
| **1.** | Click the **Commerce** link from the top navigation bar. |
| **2.** | Click the **Catalog** link from the left navigation bar. |
| **3.** | Enter in the search criteria for the catalog to edit.<br>Click the **Search** button. |
| **4.** | Click the corresponding **Edit** link of the catalog to edit. |
| **5.** | Update the information of the selected catalog. |
| **6.** | Click the **Apply Changes** button to update the information |

In this section, the following functions were performed:

- Created a Catalog
- Edited an existing Catalog

# APPENDIX I: GLOSSARY

**A**

**Account Code:** Is the unique code used to track charge back information of a transaction for the ledger.
**Active:** An active record is one that is currently available to be updated, fully functional, and will appear on reports. To change the status of a component or to view, edit, and report on an inactive record, the system administrator must grant the user a security privilege to do so.
**Active Locale:** Think of an active locale as a language with unique syntax and patterns for numbers, date and time specifications, and standards for labels as well. AgLearn has locales IDs: English, French, German, Japanese, Chinese, and Spanish. Of course these can be expanded.
**Activity (Instance):** A non-component activity you have placed on the learning calendar. Typical activities include instructor vacations, location unavailability, meetings, workshops, and course development activities. Activities allow you to indicate periods of time during which various resources are unavailable. Activities are similar to schedule instances in that they are both events that appear on the learning calendar. You can create and define activity types to suit your needs in the Activities subsection of the General References section (References section).
**Admin User ID:** The Admin User ID is used when a student unenrolls him/herself and another student from the waitlist is automatically picked by the system for enrollment. Since the system is automatically updated, it requires an Admin User ID for auditing purposes.
**AICC:** Airline Industry CBT Compliant. This is the emerging standard for online courseware that guarantees interchangeability and data exchange capability between online learning development packages and players. AgLearn is capable of level-1 compliant exports to AICC courseware and can import AICC courseware.
**Associated Costs:** Associated costs are any cost of conducting a segment of a component that have not been defined in AgLearn as instructor costs, material costs, equipment costs or location costs. You can define associated costs in the Associated Costs subsection of the General References section. Examples might include food, clean-up, or travel; and any cost of instructors, material, equipment or location that is in addition to costs for these resources that have already been defined in AgLearn. When defined in the General References section, you can optionally specify a cost amount for the type of associated cost you are defining. However, in many cases associated costs are not very predictable; you are not required to define a cost per hour.
**Automatic Processes Module (APM):** Automatic processes are processes that can be set up to perform certain housekeeping and notification processes when a user logs in or at other scheduled intervals. Here are the names of all the available automatic processes; their names give a hint as to what they accomplish: Instance Delivery Inventory Reorder Qualification Clean-up Training Expiration Waitlist to Request List Reset Online Component

**B**

**Background Jobs:** Background Jobs are time-consuming processes that are scheduled to run at another time as asynchronous events. The number of records defined in the selected job MUST exceed the predefined threshold (Maximum Record Count for Online Operation) set for running background jobs.  The system administrator will configure AgLearn to indicate the Maximum Record Count for Online Operation for your organization.

## C

**Cancellation Policy:** The Cancellation Policy is the set of rules used by the system to calculate what the student is charged upon canceling the schedule instance of a component or activity.
**Catalog:** A collection of components and materials.  Catalogs can be grouped by domains and/or organizations.
**Class:** An entity in AgLearn that associates student(s) with a set of schedule instances.  It is used to help teach administrators to put together students to go through a set of schedule instances.  It makes reporting and scheduling of the group much easier.  While emphasis is placed on the union of students and related schedule instances, it is important to note that you could have one without the other in a class.
**Classification:** There are three types of classifications of components in AgLearn: Instructor-lead, online, and physical good.  Physical goods may include items such as books, documents, etc.
**Completion Status:** A completion status indicates whether the student has successfully completed a learning component.  If course or learning credit is granted for the successful completion of certain components, the completion status should also be designed so that it indicates whether or not credit was awarded.
**Component:** A learning requirement that can be content, an exam, a survey OJT, or external certification.  A component can be a Physical Good, Online Component, and Time based which is generally instructor-led.
**Component Source:** A component source typically identifies something about a component that has to do with its origin.  You can use component sources to identify the developer or author of the component, the organizational or regulatory body that requires the component, or for some other type of information that you define to best suit your needs (e.g., OSHA, 21CFR, Internal, etc.) When you define component sources, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization.  The creation and assignment of component sources also helps to speed up searches and queries.
**Component Type:** Component types are categories of training activities that your organization defines to satisfy your needs.  Typical component types include course, class, certification, OJT, interview, etc.  When you define component types, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization.  The creation and assignment of component types also helps to speed up searches and queries.  Component types are established and maintained in the Component Types subsection of the General References section.
**Contact Hours:** The number of hours students were receiving instruction during a schedule instance.  For example, a component that begins at 8 AM and ends at 5 PM is nine hours in duration, but you may want to capture the fact that only eight hours of actual instruction took place because of an hour lunch break.  The delineation between contact hours and total hours allows you to keep an accurate record of the hours spent in training versus the total hours during which the resources were in use.  Contact hours associated with a component are defined when the component is created.
**Content Object:** A content object is a record that contains instructions specifying where to find and how to launch a unit of online content such as a course, demonstration, exam, tutorial or other

online application whose content is intended for students. You may create online applications "in-house" using courseware development software or they may be purchased; but in either case, you must create a content object for the application in this window. Since each content module always has a one-to-one relationship with an actual online application (files or URL addresses),and since each content module must have a title, you may often think of content objects as being synonymous with the unit of online content to which it refers. One or more content objects can be included in a component, so that a single online component may be composed of several online content applications.

**Content Player:** Any software application that is used by a student workstation to open and to play an online content object. Software such as Notepad or Microsoft Word can be used as a content player, depending on the type of content files prepared by your online courseware developer that have been included in a given content object.

**Copy Daily Segments:** Use this link to duplicate an entire day full of segments. If you have created segments that occur on the same day, all the segments that fall within that day will be duplicated. Also, all of the data will be duplicated as well. You can then edit the duplicate segments to suit your schedule.

**CPE:** Credit for Professional Education. A type of credit for completing a component.

**Credit Hours:** Credit hours provide a method of accounting for a student's successful completion of components. Any number of credit hours can be associated with each learning component in accordance with the needs of your organization. When the student has earned a successful completion status through their participation in a component, the credit hours are awarded to the student.

**Critical Needs:** Critical needs are learning needs that have expired, are overdue, or will expire within the qualification expiration notification threshold set by the system administrator.

**Currency Pattern:** The currency pattern is used to indicate the default format for currencies used in the selected active locale.

**Custom Report:** Custom reports allow you create customized reports specific to your learning organization. The reports you develop are then easily run in AgLearn. For each custom report you create, you MUST provide a report definition and a Configuration for the report pipeline in order for the new report to work properly. The Definition of the report has three major parts: Criteria, Report Queries, and the Report UI. The Criteria is the representation of what the user will see on the initial report page. The Report Queries comprise the Standard Query Language (SQL) that is used to pull the report data from the back end. The Report UI will define the presentation of the results of the report after it comes back from the database.

**D**

**Days Remaining:** Number of days remaining before the expiration of the Required Date for completing a specific component.

**Decimal Pattern:** The decimal pattern is used to indicate default format of whole integers with specified decimal places used in the selected active locale.

**Delivery Method:** The instructional method used to deliver learning. Examples might include Instructor-Led Training, Computer-Based Training, On-The-Job Training, and Self-Study. However, delivery methods are defined by your organization to suit your specific needs. When you define delivery methods, you should keep your reporting and information tracking needs in mind, as the

establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of delivery methods also helps to speed up searches and queries.
**Delivery Offset Days:** The number of days prior to the scheduled delivery date of the selected component/material.
**Development Plan:** The development plan is a list of the components that a student must complete, and target or deadline completion dates for each. To view the development plan for any student, bring the student's information into view in the Students section, and choose the Development Plan tab.
**Document:** Any media item (book, videotape, procedure, manual, audiotape, regulation, etc.) for which a record has been created, enabling it to be tracked by AgLearn Administrator. Documents are associated to components, to qualifications, and/or to tasks. Document revisions may have an impact on any of these, and when you record a document revision, the component, qualification and task records to which it is linked will be flagged for review with respect to its relationship with the document.
**Document Type:** Document types are categories your organization sets up for the printed materials used in training documents, based upon your needs. Examples may include Vendor Manual, Regulation, Corporate Policy, and Job Aid. When you define document types, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of document types also helps to speed up searches and queries. Document types are created and maintained in the Documents section of the General References section.
**Domain Restriction:** The domain restriction is used by administrators to set limitations on workflows in order for users to access only domains that are predefined in the set of restrictions applied. See workflow.
**Domain Type:** Domain types are record types that can be assigned to a domain. If a domain includes a particular domain type, then records of that domain type can be assigned that domain. For example, if a domain includes the Organization domain type then organization records can be assigned that domain. The domain types are: Students, Components, Qualifications, Competencies, Proficiency, Profiles, Schedule Instances, Facilities, Locations, Equipment, Instructors, Tasks, Documents, Tasks, and Organizations.
**Domains:** Domains are created by your system administrator, and are used to control access to data.

## E

**Effective Date:** The date when a new or revised component will be used for the calculation of component completion statuses and qualification statuses. When you create a component, the default effective date is the current date; but you may decide to set it to a future date since the qualification status of any student who is assigned the qualifications to which you are adding this new component would become "incomplete" as soon as the component is added. By making the effective date a future date, you are defining a "grace period" to allow students to complete the new component in the time allotted, without losing their qualification.
**Employee Status:** Employee statuses are student categories that are created by your organization to suit your needs. Typical employee status codes might include Full Time, Part Time, Temporary, and Contractor. When you define employee statuses, you should keep your reporting and

information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of employee statuses in the Employee Statuses subsection of the General References section also helps to speed up searches and queries.

**Employee Type:** Employee types are student categories your organization defines to suit your needs. Typical examples of employee types include Exempt, Hourly, and Contractor. When you define employee types, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of employee types in the Employee Types subsection of the General References section also helps to speed up searches and queries.

**Enroll:** To place a student's name on the planned list of participants in a specific course instance. In other systems this may be called 'registration'. There are three enrollment statuses in AgLearn: *Active Enrollment* - This is the list of students for whom a seat is reserved for a specific instance. *Waitlist* - This is the list of people who are trying to enroll in a specific instance of a course when enrollment has already reached maximum capacity. AgLearn does not automatically add waitlisted students to the active enrollment list when there are cancellations; but instead allows you to decide which waitlisted student(s) should be moved to the active enrollment list. You can use the Waitlist to Request tool in the Automatic Processes section of System Admin to periodically create enrollment requests for students who were on a waitlist status and the instance they were waitlisted for has already begun. *Request List* - This list contains students whose need for a particular component has been identified, but who have not yet been enrolled or waitlisted against a particular instance. The request list might include, for example, students who have a requirement for the learning event but who cannot attend any of the currently scheduled instances of the component because of scheduling conflicts.

**Enrollment Status:** Enrollment statuses are categories that your organization creates and defines which describe a student's status with respect to enrollment in a particular schedule instance. You can create as many enrollment statuses as required within each of the four enrollment types. When you are selecting an enrollment status in AgLearn, the first letter of the enrollment type for that status is displayed in parentheses after the enrollment status description. The list of enrollment statuses are maintained in the Enrollment Status subsection of the General Reference section. Default enrollment statuses are assigned to enrollment types in the Enrollment Statuses subsection of the Application Admin section (SystemAdmin area).

**Equipment:** Physical resources used in the delivery of training that are typically used over and over. Examples of equipment might include overhead projectors, television monitors, and VCR players. Equipment is a distinct resource category from materials, that are consumable in nature (i.e., cannot be used over and over).

**Equipment Status:** The current status of a given piece of equipment, as defined by your organization in the Equipment Status section of the General References section to meet your needs. Examples might include Operational, On Loan, and Inoperative. You determine which equipment statuses reflect that a piece of equipment is available to be scheduled for use, and which statuses reflect that equipment cannot be scheduled. Equipment status data is then used by AgLearn to provide a reliable list of available equipment for scheduling purposes, displaying only equipment with a status that allows for it to be scheduled.

**Equipment Type:** The category or type of a given piece of equipment. Examples might include Overhead Projector, VHS VCR, and Video Monitor - 25 inch. Equipment types are used by AgLearn to build the list of equipment that is available to support a particular instance when it is scheduled. By default, AgLearn will only display equipment of the type(s) that have been built into a

component's scheduling defaults. The list of equipment types is maintained in the Equipment Types subsection of the General References section.
**Exam/Survey Object:** A database record, created in the Exam Objects section, that contains all the details of an online examination or survey including the questions and objectives included by the exam or survey, the percentage grade required for passing, electronic proctoring requirements, messages displayed to students before and after the exam, the exam's launch method, information about student usage and other software behaviors.
**External Exam:** An external exam is any exam that has been created with some tool other than Plateau Administrator and Plateau Question Editor. In order to use an external exam in an online component, typically, external exams are based on '.html' and therefore, the browser should be specified as the content player for an external exam. Student performance data (scoring data, passing, failing, etc.) on '.html-based' external exams, as well as related component performance data, is communicated to your organization's AgLearn database. It is strongly recommended that '.html-based' external exams be designed to include only one question per '.html' page, in order that the performance data can be sent to the AgLearn database.
**External Reports:** These reports are generated using third party tools and then run in AgLearn. They are part of the AgLearn legacy reporting tool. A new Custom Report is now available as part of the newly created Reporting Framework.

**F**

**Facility:** A facility is grouping of training locations. Facilities may be buildings, plants, branch locations, or some other way that makes sense for you to group locations. The locations within a facility can share the facility's workweek profile, holiday profile, equipment inventory (for equipment assigned to a specific facility but not to a specific location within the facility) and material inventory.
**Force Incomplete:** When you enable the “Force Incomplete" option for a qualification component, the system will calculate whether the status should be complete or incomplete based on the student’s latest attempt at completing the component. If the student’s latest attempt is incomplete, the system will calculate the expiration and required dates based on the date/time of the last unsuccessful attempt.
**Formula:** In the Cost Formula tab, you can add formulas for the selected cost name by entering either a Cost Formula or a valid Custom Cost Calculator.
**Free-floating competency:** A free-floating competency is a competency that is assigned to a student independently from the assignment of proficiency profiles to that particular student.
**Free-floating component:** A free-floating component is a component that is assigned to a student independently from the assignment of qualifications to that particular student.

**G**

**Gap:** The difference between a required mastery level and the student's current mastery level of a specific competency that is included in the student's proficiency profile. A negative gap indicates a learning need (i.e., the required mastery level is 4 and the student is assessed to have a mastery level of 3; therefore, the gap is -1 and a learning need exists.) You can view a student's gap information in the Proficiency Profiles tab of the Students section (Student area).

**Grade:** A value that can be used to indicate, for instance, a student's examination score associated with a learning event. AgLearn can now use grades to determine the completion status of a learning event. These settings are adjusted on the Grading Options tab of the Components section (Learning area). You may grade using either a numeric system or a value-based system.
**Group Instance:** A group instance is a grouping of existing schedule instances that all are associated with a particular group instance name. Group instances help you to ensure that if you need to keep a particular group of students together, enrolling them in the same schedule instances, you can more easily do so. By creating a group instance of a particular name, then assigning that name to students in a custom field of the Student section, for example, you can more easily select and enroll the correct students for the correct schedule instances.
**Grouping:** Grouping is a term that relates to the way report output is displayed. Many of AgLearn's report data collectors allow you to group data by various criteria in order to give certain features of the output greater visibility. For example, in the Student Qualification Status report, you can group by student to see the status of the qualifications by student, or you can group by qualification to see the status for all students who have been assigned that qualification. Report outputs contain appropriate headings for each group of output, and many of AgLearn's standard reports also give you the option of starting each group on a new page by inserting page breaks between each group.

## H

**Hints:** A brief on the UI to remind the user of an example.
**Holiday:** Calendar dates defined by your organization, when training should not be scheduled at a learning facility. When you schedule an instance, AgLearn will not allow you to schedule the instance at a facility on a date that has been defined as a holiday, unless you override the default. When you schedule an instance having a duration of two or more days, AgLearn will skip over any holidays unless you override the default.
**I18N (Internationalization):** The process of developing and implementing the application so that it is easily adaptable to a specific local language and/or standards- localized. An example of the features in this process is ensuring data space so that messages/labels can be translated from languages with single-byte character codes (such as English) into languages requiring multiple-byte character codes (such as Japanese Kanji).

## I

**Initial Period:** The number of days a student is allowed between the assignment of a learning requirement and the required completion of that requirement. For example, if a component is assigned an initial period of 30 days, whenever that component is assigned to a student, that student has 30 days to successfully complete the component before their learning requirement becomes overdue. Each component can have an initial period assigned to it, and initial periods can be overridden on assignment.
**Instance:** A specific scheduled event, such as "the HR101 class scheduled for October 15 in Room 320 at the Main Office," for which a database record is created in the Schedule Instances section. Either of two types of events can be scheduled in an instance: components (during which learning of some sort takes place) and activities (non-learning events that are accounted for on the schedule of a student, instructor, or location; such as vacations, staff meetings, etc.).

**Instructor:** A person who delivers learning. Although any person can be indicated as an instructor when recording learning events, instructors managed in AgLearn can be assigned a list of components that they are authorized to teach, thus improving the process of selecting and scheduling instructors to deliver a specific component.
**Integer Pattern:** The integer pattern is used to indicate default format of whole integers used in the selected active locale.
**Inventory Type:** In AgLearn you can have two types of inventory: material or component.
**Iteration (online exam):** An attempt by a student to complete an exam. For exams and surveys created in the Exam Definitions section, iterations can be limited to one by specifying, on the Summary tab, that the maximum number of allowable attempts for the exam is one. You can make instructor or learning administrator intervention necessary between iterations by setting the Lock exam flags, also found on the Summary tab of the Exam Definitions section.

**K**

**Job Location:** The location where a student works. You can define job locations to be as specific as a particular assembly or production line, or in a more general way, such as a branch location, building, or country. When you define job locations, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of job locations also helps to speed up searches and queries.
**Job Position:** The student's job title or function. Examples may include Teller I, Manufacturing Technician, and Administrative Assistant. You can also include ranks or ratings in the job position, if it suits your needs. Job positions are important when assigning and tracking learning to students since their qualification status is often directly tied to their job position. When you define job positions, you should keep your reporting and information tracking needs in mind, as the establishment of these categories can greatly increase the value of AgLearn's standard reports to your organization. The creation and assignment of job positions also help to speed up searches and queries.

**L**

**L10N (Localization):** The process of adapting the application to a particular language, and desired local standards like date, time, currency, etc. AgLearn is an internationalized application: developed so that localization is relatively easy to achieve.
**Label Links:** Label links serve both to name the data entry field next to it (usually the link is just to the left of the field that it names); and as a tool to help you select the data you wish to appear in the field. When you click on a label button, a search page opens, allowing you to choose from allowable values.
**Label:** The value displayed describing a specific item on the UI of the application.
**Locale:** The locale is a specific language with unique syntax and patterns for numbers, date and time specifications, and standards for labels as well.
**Location:** A particular location within a facility where an instance (or a segment within an instance) of learning is delivered. Locations might be classrooms, simulators, or conference rooms. See also Location Types.

**Location Type:** Location types are categories that describe learning locations, which your organization defines to suit your needs. Typical examples might include Classroom, In-Plant Location, Simulator or Auditorium. Location type data is used by AgLearn to provide a list of suitable locations when you are scheduling an instance of a particular training component. By default, AgLearn will only display locations of the type(s) you have indicated are suitable for the component you are scheduling, but the default can be overridden if necessary so that you can also see locations of other types.

### M

**Master Inventory:** The Master Inventory is used to store all of the components and schedule instances available in your LMS. Catalogs are populated from the master inventory.
**Mastery Level:** Rating given to a student that indicates his or her command of a specific competency. The rating scale that is used is established in the Competency Assessment subsection of the Application Admin section (System Admin area).
**Materials:** Consumable supply items that are used up during learning, such as pens, handouts, giveaways, etc. For each kind of material you decide to track, you create a material type and then assign the material type to a facility, establishing an inventory record for the material at a given facility. Material inventory levels are updated directly by editing the number on hand in the Materials tab of the Facilities section or the Inventory tab of the Material Types section.

### N

**Next Action Date:** See Required Date.
**Notification:** Has proper email addresses for both the Sender and Receiver. It also has a Message as well as a Subject. These four elements form the notification. You may add attachments to the notification.
**Notification Database Tag:** Is the variable used in the notification templates and syntaxes that are substituted at run time with context-based data.
**Notification Syntax:** This is the notification tag definition or dictionary that is used to perform looping. The tags are variables that are populated at run time based on the context of the notification.
**Notification Template:** A pre-parsed message format that includes database tags to be populated at run time within a defined context. The templates may have multiple syntaxes.
**Numeric Grading:** Numeric grading is one of the options that can be used when grading components. For each component, you can establish several ranges of scores and associate each with a completion status. If a student achieves a score within a particular range on a component, then they are assigned the corresponding completion status. See also, Value-Based Grading.

### O

**Objectives:** An objective is a generic learning object such as a grouping of questions that have been created in the LMS Objectives section or in Plateau's Question Editor application. Questions are associated with objectives on the Summary tab of the Questions section (Learning area) or by

using AgLearn's Question. Normally, all of the questions in a given objective should measure the student's mastery of a small, closely related topic, process, task, or unit of instruction in an online component. One or more objectives make up a single content object or exam/survey; and one or more content object, or exam/surveys, make up an online component.
**Offset:** This term is used to schedule deliveries and other tasks throughout PWA. It is used in the Component and Scheduling modules to schedule the number of days before an instance begins that the corresponding material should be sent. When Editing the Scheduling Segments for a Component, the offset is used to determine the starting time of the segment based on the ending time of the previous segment. When Setting the Cancellation Policy, the "offset days" is used to enter the number of days that a reimbursement policy takes effect. for a cancelled scheduled instance.
**Online Component:** An online component is any component that is available for students to use as a CBT course. In AgLearn, you create an online component as you would create any other component, with the following two additional steps on the Online Settings tab of the Components section: You create a course structure that may include folders, objects, and exam/surveys. You specify that the component is available online.
**Online Instance:** When a student launches an online component for the first time, as opposed to launching an online component that he or she has already begun, an "online instance" of the component is launched. Once a learning event is recorded as a result of the student's completion of the online component, whether or not the associated completion status grants credit, a subsequent launch of the same online component by the same student creates a brand new "online instance" that can result in the recording of a brand new learning event when the component is eventually completed for a second time.
**Organization:** An organization is an entity of some type to which a student belongs. Organizations are user-defined to suit your needs. For example, you might choose a functional organization (Manufacturing, Administration Corporate QA), an accounting organization, an organization according to internal or external business units, or some other basis for defining organizations.
**Organizational Group:** An organization group is used ONLY as a search criterion for plowing through massive student records. It is a grouping of organizations.

## P

**Pattern:** A Pattern is a format that determines the way that dates, time, and numbers are displayed throughout the application. Patterns are created and maintained in the Tools section.
**Pattern Types:** There are four pattern types for number formats: 1. Integer: This pattern type is used to indicate default format of whole integers.2. Decimal: This pattern type is used to indicate default format of whole integers with specified decimal places.3. Currency: This pattern type is used to indicate the default format for currencies4. Percentage: This pattern type is used to indicate the default format of the percentages.
**Percentage Pattern:** The percentage pattern type is used to indicate the default format of the percentages used in the selected active locale.
**Post-work materials:** Consumables that must be sent to students and/or instructors at some point after the scheduled instance of learning. Examples might include surveys, follow-up reading material, etc.
**Pre-work materials:** Consumables that must be sent to students and/or instructors at some point in advance of the scheduled instance of learning. Examples might include prerequisite reading material, pre-class skill assessment tool, etc.

**Pricing Rule:** The ID, description, and discount rate (percentage) for pricing items in the Master Inventory and catalogs.
**Proctor:** A proctor is an instructor who has been designated as an online examination monitor. Proctors are assigned proctor codes that enable them to unlock student machines in the event of certain events or conditions, such as a failing grade on an exam.
**Proficiency Profile:** A grouping of competencies that can optionally be associated with a job position, a duty area, or a function to help you manage the consistent assignment of proficiency profiles to students with similar responsibilities. You can create proficiency profiles to include minimum required mastery levels, helping you to identify gaps in a student's training. Proficiency profiles are created and maintained in the Proficiency Profiles section.
**Profit Center:** Refers to the entity/account that is being credited in the transaction.
**Published Price:** The price published for a selected item/component.

**Q**

**Qualification:** A grouping of components and/or sub qualifications that allows you to more easily assign a given set of learning components to a student, and to track the completion and maintenance of required learning.
**Question:** A question, generally speaking, is a single screen that appears in an exam/survey, giving students an opportunity to demonstrate their ability to distinguish the correct answer from among a choice of possible answers. Normally, all of the questions in a given objective should measure the student's mastery of a small, closely related topic, process, task or unit of instruction in an online component. One or more objectives make up a single content object or exam/survey; and one or more content object, or exam/surveys, make up an online component.

**R**

**Region:** A region is an entity within your learning organization that you create according to your organization's needs. Regions can be set up according to business line, geography, or some other criteria. Only two types of assets are directly assigned to regions: facilities and instructors. However, regions can be very significant when you consider that if you assign facilities to regions, the locations, equipment and materials associated with the facility are also regionalized.
**Request:** A request is a notification that a student wants or needs to complete a specific component. A request does not place a student in active enrollment or on the waitlist for any specific instance that has been scheduled. Usually, requests are entered in the Requests tab of the Components section (Learning area), but there are a couple of circumstances where AgLearn will create requests: When a component is canceled, you will be asked whether you want to generate requests for the students that were enrolled or waitlisted for the instance. When a scheduled component that has a waitlist is delivered, a request can be generated for each student that was on the waitlist via the Waitlist to Request automatic process.
**Required Date:** The date by which all components related to the selected qualification must be completed.
**Requirement Type:** Requirement types are categories you can establish for components to help you to prioritize a student's learning needs by distinguishing between "need-to-have" and "nice-to-have" components. Typical examples of requirement types might include Required, Optional, and

Regulatory. Requirement types are maintained in the Requirement Types subsection of the General References section. When you assign a requirement type to a particular component, it serves as a sort of "default requirement type" whenever the component is included in a qualification; however, you can override the default requirement type of the component once it is included in a qualification.
**Resource:** Resources are assets whose availability is essential to your ability to schedule an instance. AgLearn helps you to manage several types of resources: Instructor - The person responsible for delivering or facilitating training, whose schedule must permit him or her to be available during the instance to which they have been assigned. In AgLearn, instructors can be students that have additional qualification requirements, or they can be external to the organization. Location - A managed resource, most easily identified by its unique physical location, the availability of which is necessary for training delivery. Examples might include: classrooms, training trailers, practical laboratories, off-site training locations, and simulators. Locations can be grouped into facilities, which can make certain aspects of location management easier.
**Retraining Interval:** The number of days required before the student is to re-complete a recurring learning requirement.
**Review Flag:** A system-generated flag automatically created when a document is revised. The flag indicates that a component or qualification related to the document has not been checked for any potential conflicts between the current information and information that may have been added, deleted, or changed by the revision.
**Revision Date:** The date of origination, or the date of last revision, of a component. The revision date of one of the three parts of the component database key. If no revision date is specified, then the latest revision is assumed.
**Role:** A role is a combination of one or more workflows (mix of a function applied to an entity). One or more Roles comprise a User. See workflows.
**Rule:** Comprises of a Delivery Offset (Days) with a corresponding reimbursement price adjustment for the selected component or material.

**S**

**Schedule Instance:** A specific scheduled event of a component or activity for which a database record is created in the Schedule Instances section. Two types of schedule instances: component and activity.
**Search Page Icon:** A control that opens a search page where you can select an item. The item you select will fill in the corresponding field to the right of the icon.
**Security Profile:** Pre-defined sets of security (e.g., view, create, modify, etc.) permissions, called security functions, that are assigned to each user of AgLearn Administrator. The security profiles and domain privileges work together to define a user's permissions in the system. Security functions are associated with security profiles in the Security Profiles section of the System Admin area.
**Segment:** Unit of division of a course instance, based on duration that facilitates variable resource scheduling. For example, a 40-hour course can be scheduled in any of the following ways: Divided into five 8-hour segments, scheduled one segment per day for five days Divided into ten 4 hour segments, scheduled two segments per day for five days into four 10 hour segments, scheduled one per day for four days. Divided into any number of segments of uniform or varying duration, scheduled over a period of days in order to fit the particular circumstances. Thus, AgLearn gives you flexibility, which allows you to schedule a course that meets first for a two-hour segment in an

auditorium, then for a three-hour segment in a classroom, even though the segments may have completely different instructor and resource requirements.
**Sequence Numbers:** Sequence Numbers indicate the order in which the student should complete the components that make up this qualification. The sequence number indicates the order in which components assigned to a qualification should be scheduled. This is important when creating a qualification schedule.
**Shopping Account ID:** A unique ID created for individual students and organizations to track their commercial transactions.
**Slot:** A slot is a reservation made by an organization for enrollments in a schedule instance. Names of specific students may not be available when the organization acquires slots, but at some point, names of students who belong to the organization that acquired the slots can be supplied. Slot requests are recorded using the Enrollment tab in the Schedule Instances section or by using the Enrollment Assistant tool; and slots are filled by student names using the same tools provided for enrolling students normally, such as the Enrollment Assistant tool or the Enrollment tab of the Schedule Instances section. Slots can also be associated with line items and be reflected in purchase orders.
**Sorting:** Sorting is a report-related term. Several of AgLearn's report data collectors allow you to sort data by various criteria in order to change the nature of the report. Sorting is a term that relates to the way report output is displayed. Many of AgLearn's report data collectors allow you to sort individual rows of report output data by various criteria to make it easier for you to find the data that is most interesting to you. For example, in the Student Qualification Status report, you can sort by completion date to see the most recently completed learning at the top of each output group, or you can sort by component ID to see all of the learning events related to each component right next to each other.
**Student:** ANY person for whom a record has been created in the Students section of the Student Management area (these are the records that appear and are created in the Students section), including employees, contractors, and others for whom you wish to keep learning records and to enroll in courses.
**Subject Area:** This is the area of concentration of the selected component or material. Examples of the subject areas may include Safety, Accounting, Manufacturing Process and Quality Assurance, depending upon your needs.
**Supervisor:** A supervisor is a student that has been designated to oversee another student's learning. A supervisor has the ability to log in to AgLearn Student Access on behalf of their students, and to view their students' learning information and assign learning to them. If granted permission by the system administrator, they can also record learning events for their students.
**System Report:** These are the standard reports that come with the AgLearn LMS. The system reports are part of the newly created Report Framework. The new framework gives you more options with respect to the format of the reports.

**T**

**Target:** Indicates whether the student or instructor should receive the material.
**Task:** A task is a discrete unit of work with a definite beginning and end, which can be performed in a relatively short period of time, and which results in one of the following: - a finished product - a completed service - a change in the work environment. You can create records for tasks, which can then be related to components, competencies, to job positions, to job locations, and to documents. This results in greater visibility of the relationship between components and particular

aspects of actual job performance (e.g., you can keep track of the tasks that are covered by an on-the-job (OJT) guide and its associated job performance measure (JPM).
**Total Hours:** The number of hours that the resources for a scheduled component are in use. For example, for a component that meets from 8am to 5pm, there may be eight hours spent in training (contact hours) but nine total hours, indicating the number of hours the resources are in use; the extra hour takes into account the lunch hour, a non-learning activity. The
delineation between contact hours and total hours allows you to keep an accurate record of the hours spent in learning versus the total hours during which the resources were in use. Total hours associated with a component are defined when the component is created.

**U**

**User:** A user is anyone, with administrative access to the application, whose information has been recorded in the system. The system uses the user's information to restrict his/her access to the application. A user is comprised of one or more roles. See roles.

**W**

**Waitlist:** A list of students for whom no space currently exists in a scheduled instance. You can set up AgLearn Administrator such that students can be moved automatically from the waitlist to a request list using the Waitlist to Request tool in the Automatic Processes subsection of System Admin.
**Work Weeks:** Days of the week, defined by your organization, when learning can be scheduled at a facility. When you schedule an instance, AgLearn will not allow you to schedule the instance at a facility on a day of the week that has been excluded from the workweek, unless you override the default. When you schedule an instance with a duration of two or more days, AgLearn will skip over any weekend or non-training days unless you override the default.
**Workflow:** A workflow is a combination of a function applied to an entity. An example of a workflow is 'View Students' i.e. the function 'VIEW' and the 'ENTITY' students. A domain restriction is applied to each workflow to restrict access to certain data. See Domain Restriction